



REALSOLUTIONS - COUNTY GOVERNMENT  
**COUNTY OF WESTCHESTER**  
Case Study



## AT A GLANCE

Just minutes from New York City, Westchester County sought an enterprise-wide content management and workflow solution that could service the entire employee population of 4,000 as well as be able to seamlessly integrate to their line-of-business applications. The OnBase integrated content services software met the evolving needs of this bustling municipality and provided secure constituent web access to public records information.

## BENEFITS

- Allows the county to adopt a case management approach, so the department of Social Services could enroll constituents in multiple programs without duplicate paperwork
- Completely eliminate paper-based report distribution
- Scan and electronic storing of signed contracts, invoices and purchase orders to allow for instant retrieval in the event of inquiries
- Automated workflows manage internal processes such as IT equipment requests, HR employee files, Budget Requests and the Capital Acquisition approval process
- Allows important files to be electronically archived, preserving them
- County Clerk's office makes public record documents readily available to constituents via the County Clerk Portal

## APPLICATIONS

- Social Services
- Finance
- Records Center
- Human Resources
- Budget
- County Clerk's Office
- IT

## ONBASE SOFTWARE

- Content Services
- Application Enabler
- E-Forms
- Workflow
- Web Servers

## COMPLEMENTARY PRODUCT INTEGRATIONS

- Case management application
- Existing mainframe

## The County of Westchester Adopts OnBase As Enterprise-Wide Solution

The County of Westchester is a 457 square mile area near New York City with a combination of urban and rural character. To regulate such diverse functions as Parks and Recreation and the Department of Social Services, the county sought an integrated content management system that could address the needs of the varied departments and allow them to securely share the information collected.

The County of Westchester chose Hyland Software's OnBase software after an exhaustive search for an enterprise content management system that could meet all its requirements. "They were looking for a single system that could start small but eventually be expanded to service all of their departments and users," states Gerard Manna, President of Computer SI Corporation, the county's OnBase Solution Provider. Mr. Manna adds, "Prior to installing OnBase, they had two different imaging systems, neither of which were compatible with each other. They wanted to replace these systems with a single enterprise content management system that supported not only imaging but also case management, workflow and public web viewing of public record documents. The county also required that the new system seamlessly integrate to their many line-of-business applications. The OnBase software met all of their requirements, and Computer SI was selected as the County's vendor to implement it throughout the organization"

### OnBase Usage Adopted County Wide

The county wanted a case management system, which would electronically organize the information for constituents using the county's services. Currently, that case management approach has been implemented within the Department of Social Services. OnBase's retrieval and workflow is integrated with a web-based application developed by the county, which allows caseworkers to track the documents necessary to certify and recertify applicants for Medicaid, Daycare and Food Stamps. Clients applying for different programs no longer must fill out duplicate paperwork, since their files are accessible to all functions within the department.

Using OnBase, the county has implemented a completely paperless distribution process for reports. The Finance department also scans and stores contracts, purchase orders and invoices for instant retrieval, responding real time to vendor inquiries. The IT department has created an OnBase workflow that permits department managers to request hardware and software installations for new hires and new application software installations for existing employees. The workflow expedites installation by notifying different IT groups simultaneously when software can be installed. The County of Westchester Records Center uses OnBase to electronically store historical documents for archival purposes.

Human Resources and the Budget Department interact through OnBase Workflow. Paperwork requesting county job classification additions or changes is initiated at the individual departments, routed to Human Resources and then to Budget for approvals. Answers are routed back to the originator quickly and can be tracked easily. Workflows are accessed and originated both through a web browser and the OnBase Client.

## The OnBase Public Viewer

OnBase also manages the collection of documents for the Westchester County Clerk's Office. Computer SI Corporation has aided the county with its applications, developing workflow and custom user interfaces for the County Clerk's office. OnBase stores all the land and public records, which can be retrieved and examined by the public through a custom viewer located at the County Clerk's offices in White Plains or via the County Clerk's public facing portal.

While using OnBase for over the last 19 years, the County of Westchester continues to implement OnBase solutions throughout its organization, creating new workflows to automate paperwork between and among its diverse departments. With OnBase, the county has a product that provides the flexibility and horsepower needed for continued future growth and automation.