

RETURN ON INVESTMENT WITH CartêGraph SOLUTIONS

“Based on our ongoing success, we have a lot of people asking, ‘Can we do this in CartêGraph?’ More often than not, the answer is yes.”

- Jim Reid, Utilities Technology Analyst, City of Santa Maria Utilities Department

When Jim Reid arrived as an IT System Analyst at the City of Santa Maria, California, he was greeted by an array of tools that really hadn't been given the opportunity to realize their true potential. While the City had successfully installed a suite of CartêGraph solutions, it seemed that they had yet to utilize them in a way that was truly meaningful to their day-to-day operations. Leaning on a successful career spent in aerospace and technology support positions, Reid approached the City's network with a fresh set of eyes. Utilizing the flexTECHNOLOGY inherent to all CartêGraph software, Reid was easily able to tailor Santa Maria's workflow and asset management system in a way the best fit the specific needs of the City. As a result of this cleaner, more refined method of workflow, Santa Maria has realized a return on investment and results that have them poised to experience even more success in the future.

Prior to its comprehensive technology integration, the City of Santa Maria was still laboring under the difficulties of a recordkeeping system whose origins were rooted firmly in the past. Manually written work orders were cumbersome to complete and bothersome to track. Additionally, overstuffed filing cabinets made lives difficult whenever it



came time to compile information for reporting purposes. As a result, Department heads were often left to wonder what tasks were actually completed by whom, and how many hours were spent completing them.

“Sometimes, it literally took weeks to dig through a pile of work orders just to figure out that this guy spent 2 hours, or this guy spent 4 hours on this task and so on,” explains Reid, referring to the process involved with cost accounting and reporting.

Having already identified a suite of CartêGraph software that was full of unexplored possibilities, Reid knew that he had the tools—now he just needed to know how to use them. With that in mind, Reid reached out to CartêGraph representative, Tim McAndrew. Eager to help,

McAndrew immediately assembled an integration team that began re-examining the City's situation and re-imagining solutions that were based specifically on Santa Maria's stated needs. The City began with two clear-cut intentions—to reduce paperwork and to establish a clean traceability of its work orders. With those initial goals in mind, Reid, along with CartêGraph implementation and training consultants, took to the task of customizing and linking their applications to streamline the processes involved with recordkeeping and workflow. Thoughtfully weighing Santa Maria's circumstances, CartêGraph specialists determined that the *WORKdirector* and *CALLdirector* applications would be ideal starting points.

In the *WORKdirector* program, Santa Maria found the ability to track and maintain all of its current and historical workflow information—including activities, materials, employees, and equipment—and to manage a task from its initial request, to the scheduling of maintenance, and through to its completion. In the *CALLdirector* application, the Utilities Department made major and efficient strides by giving call takers the ability to record internal and external requests, automatically generate work orders, and track the facets of a given task—including activities, materials, employees, and equipment. From a recordkeeping perspective, Santa Maria found itself able to better track historical data too, with new options to filter information by date range, activity, issue, route, and caller history.

With the systems functioning better than ever before, Reid took to the task of observing and refining applications. Utilizing CartêGraph flexTECHNOLOGY, Reid was able to customize, add, and sometimes eliminate, fields, forms, and reports, allowing Santa Maria to track and report on the exact information that staff needed in order to make informed and efficient decisions.

"The really nice thing about CartêGraph applications is that they give an organization the ability to create a form that everybody is happy with," says Reid. "We can create any fields that they want, and anybody can get to it."

When it comes to technology, Jim Reid often describes himself as someone who likes to "push the envelope." And while still basking in the positive success garnered via the intuitive layout and easy interface that the *WORKdirector* and *CALLdirector* applications provided, Reid's inquisitive nature came to the surface and he began looking more closely at the "inner-workings" of the programs. Having already built a strong relationship with CartêGraph's technical staff, he felt very comfortable posing questions as to how these applications worked and how he could take their capabilities further. Based on Reid's curiosity and his wish to create his own tailored applications, CartêGraph recommended *VERSAtools*, a "tool kit" that can be used to design and create new management applications that are specific to the exact needs of an organization. Retaining all of the functionality and the features

of a standard CartêGraph application, *VERSAtools* provided a module template that allowed Santa Maria to focus on specific areas of need and create completely customized management solutions. Among its many uses, Reid learned that *VERSAtools* could be used to track current and historical information on assets that exist outside the categories covered by other CartêGraph applications—such as City facilities, sidewalks, and recycling bins—and link the information to a central CartêGraph database.

With his interest well aroused, Reid eagerly moved to implement *VERSAtools*. Teaming once again with CartêGraph's technical staff, Reid got to work, first creating a module that would finally help track the City's commercial trash and recycling dumpsters.

"Every day, we were fielding calls from businesses inquiring about things such as the size of their dumpsters, number of pick-up days, and how many receptacles they were paying for," says Reid. "In the past, we relied on a Roladex file, a method that forced personnel to dig through files and call people back."

With the *VERSAtools* system in place, Utilities personnel were happily able to field requests and provide callers near-immediate answers to questions while still on the phone—decreasing incidents of dropped calls and lost information, and allowing employees to dedicate more time to other, and more pressing, tasks.

"Needless to say," adds Reid, "it made our lives easier, and now—well, we can't live without it."

VERSAtools also became a fast ally in the launch of Santa Maria's Fat, Oils, and Grease (FOG) program—an effort aimed at local restaurants and designed to regulate the methods by which fat, oil, and grease are disposed. By monitoring these disposal practices, Santa Maria was taking proactive measures to prevent these coagulating restaurant byproducts from infiltrating and clogging the City's sewer system. With *VERSAtools*, Reid was able to create a database and accompanying forms that were specific to the program's needs, establishing data fields to capture, among other things, the names of participating restaurants, inspection dates, inspection results, and follow-up recommendations.

This type of success has Santa Maria's Utilities Department looking decidedly forward, as the City continues to imagine ways to maximize their investment in CartêGraph. In the especially bright light of this money-conscious era, Reid can easily picture the budgetary benefits that Santa Maria could gain by finding ways to put their applications to new, unique, and strategic uses. While, at present, CartêGraph applications are relegated to the primary functions of the Utilities Department, he hopes that their daily benefits become evident to other City departments as well.

"I'd love for someone to come to me and ask,

'Man, how are you doing this?!' adds Reid, "or say, 'Wow—can we get that!?"

Even if those words never come, Reid will keep looking ahead, staying busy while helping to configure the City's GIS system. Once completed, Santa Maria will move to integrate and utilize the capabilities of CartêGraph's GEODATAconnect—an application that allows CartêGraph-tracked assets to be connected directly with the City's established geodatabase.

"Once it's configured, it's going to be slick," adds Reid. "We're excited at the prospect of being able to look up an asset in CartêGraph, find out all the work that's been done against it, pull additional data about the asset from the GIS, and have it all

report into one place."

In the meantime, Jim Reid will remain an advocate and a believer in the benefits of CartêGraph solutions.

"I really like the product because it is so customizable," says Reid, considering the scenarios. "Don't like this form—I'll give you a simpler one. Not enough fields—we'll add more. Longer report? Shorter report? Done."

"What do you want to report on; see; do?" he asks before answering himself. "Because CartêGraph can pretty much cover it."

CartêGraph

3600 Digital Drive
Dubuque, Iowa 52003
800.688.2656
www.cartegraph.com