



SFMTA uses Nintex to help digitize agency-wide.

San Francisco Municipal Transportation Agency uses the Nintex Platform to drive digital transformation across its workplace and operations.

Organization

San Francisco Municipal Transportation Agency (SFMTA)

Website

www.sfmta.com

Industry

Government

Country

United States

Business situation

SFMTA wanted to eliminate paper forms and digitize business processes across the agency for better coordination.

Solution

SFMTA has been using Nintex for the past 8 years, automating internal and external-facing processes ranging from electronic forms to business-wide workflows.

Benefits

100,000 + workflow executions each year that are vital business processes throughout the agency

Nintex Forms creates migration path for mission-critical legacy InfoPath forms

Easy-to-use form and workflow that allows for rapid creation of solutions with an easy learning curve.

Getting SFMTA employees on the right track

The San Francisco Municipal Transportation Agency (SFMTA) handles all transportation matters in the San Francisco area, including bus lines, bicycling, parking, and the Municipal Railway (MUNI) among others.

Virdis Gamble, Productivity Services Manager, works in the Technology Solutions and Integration (TSI) department at SFMTA. Joining ten years ago as the sole employee for SharePoint-related tasks, Virdis now leads the Productivity Services team within the TSI department. Virdis is responsible for solving technical problems employees have within the agency and finding solutions to help improve productivity. That productivity extends to business processes—improving them to make day-to-day work easier for SFMTA employees.

The TSI department at SFMTA use Nintex workflows and forms to improve various internal and external processes. One project involved extending SFMTA's subway system from one part of the city to another. The TSI department needed to automate the supply chain processes as they were previously managed manually through email, resulting in a complex and time-consuming processes.

As a result important stakeholders were left out of conversations by mistake, communication threads risked dropping off without warning and important items would sometimes go missing—all creating problems and delays. The SFMTA needed a way to ensure every process and task assigned was trackable, so contractors could be held accountable for the work they were doing.

Finding the right fit

“The infrastructure required for K2 workflows was a problem. When you need to change something, you have to change the code, recompile it, and bring the process into a live production system. It’s a very convoluted process. A quick change is possible with Nintex it just means going directly into the workflow, making the change, and trialing it on test servers before implementation. There’s no rigmarole, you don’t need developers. It’s a much cleaner solution.”

— **Virdis Gamble**, Productivity Services Manager, SFMTA

At the time, the agency was just beginning to use Microsoft SharePoint, and Virdis started experimenting with out-of-the-box SharePoint workflows. He quickly realized that SharePoint proved to be somewhat limited in scope, and he couldn’t produce quickly enough.

Virdis knew they would need a better solution for workflow automation, so he began evaluating tools outside of SharePoint—starting with K2. While K2 met their requirements, it would also involve a lot of coding, servers, and the time to deployment was too long.

Then Nintex was suggested. After witnessing its ease of use and ability to create complex workflows without code, Virdis knew the SFMTA had the answer to their workflow challenge.

Most government agencies don’t have an excess of resources, especially when it comes to IT. Their SharePoint teams may only have one or two resources internally – not a whole team of developers. “If you have limited resources in that sense, you can rapidly fire away with Nintex,” adds Virdis.

Automation inside and outside SFMTA

Since first implementing Nintex, SFMTA has deployed Nintex solutions across the agency, which support internal and external facing processes. SFMTA worked with Nintex Partner, KnowledgeLake, to scan the organizations paper forms and documents, which were then turned in to digital forms and workflows with Nintex.

Before Nintex Viridis and his team at the SFMTA didn't have a standardized way to delivering process automation solutions in the agency. Now, they have their "go-to" toolset with Nintex.

HR alternative work schedule request

SFMTA allows employees the option to choose to work four 10 hour days a week, instead of the traditional five 8-hour days. Employees have the option to work an alternative schedule, which requires completing and submitting a

form to HR for approval. Using Nintex Forms and Workflow, the agency digitized and automated this process. Now once an employee completes and submits the form, it's routed to their manager for approval, then to the HR director for final approval, and stored in SharePoint.

Electronic return to work

When drivers go out on leave for an extended period (long-term disability, family, or medical leave, etc.) they must be medically cleared through San Francisco General Hospital before they can return to work. Before Nintex this process involved drivers completing a myriad of paper forms that would need to be physically turned into different departments across offices.

Everything is stored digitally

Using Nintex Workflow, the Productivity Services team automated and completely digitized the process:

- Operators no longer have to move between different units to sign-off forms
- Ability to track status of drivers return to work process
- Eliminates non-medical related delays and drivers are able return to work as soon as they're ready

Video surveillance requests

SFMTA vehicles (Rail and Bus) record video surveillance while they are in operation and the agency often receives requests from the police, riders, and other bodies for copies of surveillance footage. As a government agency, the SFMTA must be compliant with a local Sunshine Ordinance, an ordinance to insure easier access to public records and to strengthen the open meeting laws, and follow

proper processes for handling and responding to these requests.

Historically, the requests were tracked using paper forms and each request was followed with the manual process of finding the appropriate video, burning it onto DVD, and sending it to the requester. Once completed the requests were filed away in physical cabinets.

Using Nintex Workflow and Forms, the process is now digital. The requests are now tracked on a digital form that is routed to the appropriate SFMTA employees to complete, and everything is stored digitally. Benefits of this process include:

- Streamline processes allows request to be completed faster
- Requests are trackable and requesters can be updated with the status of their request
- The SFMTA is able to process over a thousand requests each month

“Everything that’s coming out of Nintex that we can get our hands on, we’re looking at. Our most recent Nintex implementation is in Salesforce and the team is very interested in implementing workflows and forms there. They’re leaning on IT to help them get started, but they’ll pick it up quick. We’re also excited about how we can use Nintex Promapp™. That’s something we’re looking forward to taking advantage of really soon

— **Virdis Gamble**, Productivity Services Manager, SFMTA



Workflow automation that isn’t an uphill battle

With each process they automate and digitize, the SFMTA continues to see more value from the Nintex platform. Virdis and the agency are keen to continue this trend in the future, building more workflows and forms, and growing their partnership with Nintex.

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

Product or service names mentioned herein may be the trademarks of their respective owners.