County of Santa Barbara Clerk-Recorder

CLIENT SUCCESS: APPLICATION MODERNIZATION

SNAPSHOT

ORGANIZATION
The Santa Barbara County Clerk-Recorder maintains a permanent archive of recorded documents and makes those records available to the public.

CHALLENGE
Modernize a public-facing Windows-based image management and historical records software application. Provide easier public access to historical records. Facilitate operating system upgrades for department information systems.

STRATEGY
Use optical character recognition (OCR) to improve searchability of the historical index. Create a web-based application and streamline the user interface and functionality. Leverage Microsoft Azure to move the application to the cloud.

RESULTS
The public can now access the modernized historical index application from their personal devices via the web. Microsoft Azure platform as a service (PaaS) manages environment security, maintenance, patches and updates. Department information systems are released from hosting the index so computers can be upgraded to the latest Windows OS.

Santa Barbara County Clerk-Recorder maintains a permanent archive of recorded documents, including real estate records and other vital files. Official records go back to the year 1850 when the county became established, generating a large volume of data that the office must support and make available to the public. Typical users of these records include people in the real estate industry who access them for information about property ownership, chain of title, foreclosures, property easements, and other details.

Until recently, the department maintained scans of 83,000 historical records in a legacy image management software application. The original developer no longer supported the Windows application, so upkeep was difficult. It would not run on the latest version of Windows operating system, which prevented the department from upgrading its information systems and leveraging the latest security and features of the OS for other applications. The application user interface was archaic and difficult to understand. Because it was an on-premises Windows application, citizens were required to visit the office in person to access the historical index on county computers.

Leaders at the department asked Visus LLC to help them modernize the historical records system so they could upgrade their Windows computers for other applications while providing a more intuitive and user-friendly experience for users.

"The Visus team began the process with a series of in-person meetings with our staff to understand our mission and our needs," says Melinda Greene, chief deputy clerk-recorder for Santa Barbara County. "They are very good at communicating to business people without using a lot of technical jargon. The team learned about our requirements, and they transformed those into a technology solution that fully meets our needs and those of our users."

> "The Visus experts are much more communicative than typical technology providers. They are skilled at conveying the business aspects and the technology in a relatable way. They offered solution options that were valuable, effective and beneficial to our business."
>
> – Vanessa Graeff, Analyst, Santa Barbara County

Visus experts and department managers agreed that the new records system should be web-based so people can get information without visiting the county office. "We want to meet public expectations while providing secure access to these records," says Vanessa Graeff, analyst for Santa Barbara County. "Today's users expect modern, user-friendly solutions that they can access from anywhere using their personal devices."

The Visus team created a Microsoft Azure cloud application with a vastly improved user interface. They ran the 83,000 handwritten and typed document scans through an optical character recognition (OCR) tool and applied algorithms that cleaned the data and removed garbage information, making the index much easier to search.

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"This app modernization makes our index more intuitive for users," Greene explains. "Previously we had to constantly explain specific rules that the old system required. Now users can easily search the index to find the data they need. It's a more user-friendly display that supports the way people use the web today. And they can access it from anywhere."

Visus recommended that the new cloud-based application should be hosted on Microsoft Azure, a cloud computing service that offers platform as a service (PaaS). "Azure provides a lot of advantages for us because we no longer need to worry about maintaining security updates, patches or system improvements," Greene says. "Microsoft now handles all that for us. The Visus solution is one of the first implementations on Azure for Santa Barbara County, and it is a pilot program for the county network team to observe."

"Security is a high priority and a big focus for our organization," Graeff adds. "We are committed to ensuring we are up to date with all security protocols and cyber threat mitigation, so we're pleased that Azure is certified with FedRAMP." FedRAMP is the Federal Risk and Authorization Management Program that provides a standardized approach to security assessment, authorization and continuous monitoring for cloud products and services.

Greene says her staff appreciates the Visus methodology.

"The Visus experts are fantastic communicators. Through in-person meetings, phone calls and messages they were very conscious of presenting the technology in terms our people understand. They have a sharp focus for our business needs, and they were very reliable about meeting milestones. They were always right on schedule with project updates and status reports."

– Melinda Greene, Chief Deputy Clerk-Recorder, Santa Barbara County

The modernization also improves workflow and scheduling for county personnel. "Previously we required staff members to apply security and maintenance patches at night or on weekends so system outages would not affect the public," Graeff continues. "With Azure we no longer need to worry about that since Microsoft manages it with their platform as

a service." Moving to Azure also frees up the department's Windows machines since they no longer host the historical records application. That means those systems can be upgraded to take advantage of the latest Windows functionality and security.

"Visus did a great job of enhancing our environment," Graeff concludes. "They exceeded our expectations by not only freeing our Windows machines by moving the historical records index to the cloud for easy public access, they found ways to improve and augment the functionality of the application as well."

"Visus modernized our historical records application, providing web-based access for the public and making it much easier to use. Because they invested time in communication sessions with us, they were able to fully understand our needs and deliver the right technology solution."

– Melinda Greene, Chief Deputy Clerk-Recorder, Santa Barbara County

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