**Project 1: Box.com/eDefender Integration**

Mr. Deepak Budwani, Chief Financial and Administrative Office, will serve as Project Sponsor on behalf of the Office of the Public Defender, Santa Barbara County. Mr. Deepak Budwani and Mrs. Angie Stokke will serve as co-Project Managers and primary project contacts. Mrs. Sarah Rothschild and Mr. Bryan Burzon will serve as additional project team members and subject matter experts.

**Description**

Currently, the Public Defender’s office has a content management system called eDefender, parent company Journal Technologies. The Department has transitioned to a fully paperless case management system. As the transition from paper to paperless continues, additional server space will be needed to host expanded growth and to maintain our digital client files.Box.com is a cloud content management tool that would allow the Public Defender to be compliant with CJIS/HIPAA requirements, have available storage to store all files digitally, have a collaborative platform, workflow automation, build API’s to eDefender and allow governance.

Currently, the Department has approximately 80+ terabytes of case data it needs to transition to the cloud; yearly consumption is currently twenty-four (24) terabytes and increasing exponentially every year. The Public Defender plans to leverage Box.com to build the necessary infrastructure and support our network needs. The project will migrate the entire infrastructure for the Public Defender’s office to the cloud with Box.com. We would like to build in automation including integrating with AWS and Microsoft Cognitive skills to build facial recognition and transcription (similar to LA County Public Defender project). Goal is to build a speech recognition machine-learning algorithm to build transcripts of any audio or video users feed into its web-based interface. Once files are uploaded, they would be translated/transcribed/facial recognition/keyword search and place the text in transcript templates. Once uploaded, tags would be added (911 calls, body worn camera, interview) to trigger the Box Skills. Once the process is complete, Box.com will integrate with eDefender to trigger notifications, tasks, and alerts upon transfer. Minimum metadata will be sent to eDefender to trigger automated notifications (disc number, date received, case number, file format, file size, type of media (photos, 911 calls, body worn camera, videos, interviews, audios, forensics, Internet Of Things (i.e. ring camera))

**Phase two** of this project will look to OCR discovery pdfs (police reports) to extract party information from the report and send that extracted metadata to eDefender through an API. This will greatly reduce the amount of time it would take to add parties to the case. A detailed process flow chart is attached to the email as well. Another phase to be explored if discovery can be redacted based on pre-set conditions.

**Background Information**

The main objective of this project is to reduce the amount of time the lawyers, investigators, and paralegals will have to invest in reviewing video evidence and to maximize their time working on other parts of the case. To ensure optimality and cost-efficiency, our goal is to implement an interface such that it allows for scalability while still being within grounds of affordability. The team defined optimality in this project as getting a high accuracy in translation and high amount of face detection in videos.

The proliferation of electronic records and digital media has impacted the workload, storage costs, and business strategies across all industries. The criminal legal system is no exception. Over the last ten years the complexity and amount of digital information that is transmitted, stored, tracked, and reviewed between and by justice-involved agencies has grown exponentially. The Santa Barbara County Public Defender receives discovery (information about the case) from the prosecution and law enforcement agencies. It is commonly comprised of electronically shared digital files that include large PDF files, audio/video media files, cell phone and other device “dumps,” photos, and digital files that contain various technology-based investigative techniques.

In addition to the equipment, maintenance and licensing costs related to storing discovery in anaccessible manner, Santa Barbara County Public Defender staff need better tools to help them track, analyze, review, and process cases and discovery. In order to ethically prepare a case and provide effective assistance of counsel to the client, Santa Barbara County Public Defender staff must be able to efficiently access and systematically review. In every case, we get body-cam footage from every officer that was on the scene, and our attorneys are drowning in trying to get through all of that evidence.

As public defenders, they are [ethically bound](https://www.americanbar.org/groups/criminal_justice/standards/DefenseFunctionFourthEdition/) to find and review the best possible evidence to secure their client’s defense, and yet public defenders lack the financial and staffing resources to adequately do so. Public defenders find critical information in body-worn camera footage, jail calls, and interrogation videos. Client, witness, and officer statements in body-worn camera footage help public defenders identify details missing from police reports. We know that gold exists in all sorts of audiovisual evidence, and our goal is to level the playing field for public defense — especially in crucial sources of information like police body-worn camera footage, jail calls, and interrogation video.

**Scope**

1. Upon uploaded to Box.com, discovery is transcribed/translated/facial recognition/keyword search. Integrate with AWS/Microsoft Cognitive skills (similar to LA County project).
2. Transcribed discovery is added to transcript template and saved to case file.
3. Upon uploaded, send metadata to eDefender to trigger notification to staff on the case.
4. When a new case is generated in eDefender, a new case file folder (along with all sub-folders) is created in Box and the link established within eDefender. Folders would be based on Department naming convention procedures, creating root folders per case type.
5. When the case type is updated in eDefender, Box will move the case file folder to the correct root folder (the new case type) and update the link in the system.
6. OCR discovery and extract information regarding parties to send to eDefender for automated notification. Automation is built by PD IT team.

**Project 2: Digitization and Modernization of PDHelpdesk Ticketing System**

Mr. Deepak Budwani, Chief Financial and Administrative Office, will serve as Project Sponsor on behalf of the Office of the Public Defender, Santa Barbara County. Mr. Brent Modell and Mr. Luis Ramirez will serve as co-Project Managers and primary project contacts. Mrs. Angie Stokke and Mr. Xavier Navarro will serve as additional project team members and subject matter experts.

**Description**

**The 2020 global pandemic highlighted the urgent need to digitize products and services throughout the public sector. In response, the Department created its first five-year IT Strategic Plan which identifies and documents the priorities and initiatives necessary to further advance the Department’s long-term business goals. We envision leveraging new and existing technologies to enable staff to deliver high-quality client services in an efficient and transparent manner.**

The Department uses a homebuilt, Outlook-based IT ticketing system which receives and stores IT requests submitted by Public Defender staff. This process is detailed in the diagram below:



This system is functional but limited in its capabilities. It outgrew its original purpose and operating parameters. The system does not allow for advanced data analytics or workflow automation, and prohibits IT staff from obtaining a comprehensive understanding of the systems and practices used within the workspace. **Phase one** would be to build a dedicated ticketing system will provide the necessary issue monitoring and resolution tools to assist IT employees in executing their duties.

The Department licenses Microsoft 365 and has access to the PowerApps tool. We believe this tool opens many possibilities for application building and system automation. Ideally, it would be leveraged to create a fully mobile ecosystem wherein staff would need only press a single button to receive assistance.

The most critically important function of this proposed tool is that it’s intuitive to use and has a shallow learning curve. We are dedicated to creating a system which will help conserve staff time spent on repetitive tasks, such as manual data entry. Many existing help desk tools provide time-saving features which eliminate manual action inputs. For example, text modules and ticket templates, or macros coded to trigger predefined action chains after certain workflow requirements are completed. Working together, time-saving features will help IT staff process requests faster and ensure limited ticket backlog.

**Phase two** of this project will focus on the digitization of existing and future administrative forms. We envision utilizing Smartsheet, PowerApps, and other tools within the Public Defender’s tech stack to complete this goal. Phase Two of the plan to digitize and modernize the PD Help Desk can work concurrently with Phase One of the project. The Office maintains a number of operational forms which provide excellent test cases for workflow automations. We envision automating our forms to such an extent that an entire process could be executed by the press of a button.

Future goal would be to digitize the entire HR onboarding process including forms/processes/signatures and digitizing the entire employee performance review process. Both processes are very heavily paper driven, require signatures and approvals while routing the process from individual A to individual B to individual C.

**Background Information**

An IT help desk ticketing system works by first creating a ticket, which is simply a document recording all actionable information pertaining to the issue at hand. Capturing and recording requests is critical to any ticketing system. Once converted into tickets, an automated ticketing system will then allow you to track the request throughout its lifecycle, from creation to resolution. When converting these requests into tickets, a help desk ticketing system should automatically capture as much information as possible, such as the source email, phone number, and device name. This reduces the chance of errors and omissions that can easily occur with human data entry. A comprehensive service desk ticketing system can also separate incoming tickets into more manageable categories, also known as “buckets.” Separating tickets into these buckets allows IT technicians to address tickets more efficiently, organizing them by team, priority, source, or user. Any number of combinations—or buckets—can be created so the best IT technician is assigned the right tickets at the right time. For example, you wouldn’t want your desktop team to receive tickets for server problems and vice versa. Assigning tickets properly makes sure you’re using all resources as efficiently as possible. Dividing tickets in this way can also allow you or your team to focus on higher priority tickets without the noise of less important tickets.

The IT Ticking system would also cover on-boarding/off-boarding to ensure everything needs to set up an account and to disable is created. Staff would have access to this tool from their computers and smart phones. IT technicians will be able to see all tickets from their computer and smart phone, including the ability to assign tickets. Ticketing system will also allow for communication to take place between requester and technician along with the ability to add attachments.

**Scope**

1. Build a ticketing system (through PowerApps or similar product available as part of Public Defender tech stack) where all Public Defender employees can submit IT tickets. Ticketing system should have a foundation in industry best practices (ITIL)
2. Common features include but not limited to:
	1. **Self-service portal:** A one-stop shop where employees can quickly and easily submit their tickets to IT. Using a self-service portal will help standardize the ticket intake process, which can lead to automated ticket routing, alerts, and ultimately, resolution.
	2. **Ticket log:** Once a ticket is received, the next step is to log it. Would sort tickets by type of issue, automatically triaging requests to the appropriate team member, or tracking tickets through the solution process.
	3. **Assigning tickets:** To maximize the IT team’s bandwidth, tickets should be assigned to a single “owner” who will work on the ticket from start to finish. You can choose to manually assign tickets to team members, or find a product that automatically assigns tickets based on worker availability or appropriate knowledge base. Some tickets might require multiple technicians.
	4. **File attachments:** This feature can enhance the clarity of incoming tickets - users can attach screenshots of the problem or add documents relevant to their current issue.
	5. **Multi-channel accessibility:** The ability through multiple devices connect to the ticketing system.
	6. **Customizable ticket templates:** Ensure information required is provided as part of specific requests.
	7. **Historical Incident Database (Knowledge base):** Knowledge base would house answers solutions and/or answers to previously submitted issues or inquiries. A searchable knowledgebase would allow IT staff to quickly seek and find solutions to issues without needing to rediscover existing answers.
	8. **Ticket categories and tags:** Tickets are labeled by type of requests (i.e. forensic litigation requests, redaction, Box link, eDefender).
	9. **Follow up feature:** Sort of like a timer/alarm of sorts so tickets incrementally grow in priority the older they become. Combined with maybe an automated message to the ticket requestor to follow up with answers to questions or confirm/cancel if that help is no longer necessary, implementing a timer of sorts so requests are not forgotten for both parties.
	10. **On-boarding/Off-boarding:** Allow for tickets to be submitted when new employee start and when employees leave. Will cover all requirements of staff as part of the onboarding/offboarding. (PD IT staff will have out build out the workflow diagram that we can then show the students so they can have a foundation with which to build automation.
	11. **User dashboard:** Ticketing dashboards organize your open tickets by time and priorty.
		1. Log ticket specifically to the user’s device.
	12. **Reporting tools:** Based on the requests received, they will allow you to see what employees are looking for, how they are being answered, and how your team is performing as a whole.
	13. Integrate with PowerBI for reporting and monitoring.
	14. **Customer experience oriented:** The optimal ticket management system should allow you to improve your customers’ complete experience