

Laserfiche ECM Blogs

Enterprise Excellence

Written by Melissa Henley



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Located at the southern shores of Chautauqua Lake, Jamestown, NY, is the largest city in picturesque Chautauqua County. The Jamestown Public Schools serve approximately 5,000 students from pre-kindergarten through twelfth grade at six neighborhood elementary schools, three middle schools and one comprehensive high school.

In 2003, the Jamestown City School District's human resources department began investigating document management as a possible solution to managing an ever increasing amount of paper. The department's six employees were responsible for managing personnel records, Freedom of Information Act (FOIA) requests, employment applications and reports regarding civil rights, unemployment and workers' compensation, as well as all files relating to negotiations, arbitrations, grievances and meeting minutes of the district's seven unions.

HIPAA requirements mandated that employee medical records must be segregated so only the HIPAA officer and benefits manager could access them, which required keeping these documents in separate file cabinets. And worst of all, there was no disaster plan in place, so if documents were destroyed, they would be impossible to replace.

But in 2004, the district received funding from the New York State Local Government Records Management Improvement Fund to hire a records management expert to examine the feasibility of implementing document management in the HR department. By 2005, a selection committee of the district's HR director, IS director and records management coordinator were interviewing document management vendors.

"Although another vendor's 'unlimited user licenses' offer was attractive from a fiscal standpoint, our selection committee was concerned that if the product wasn't user friendly, unlimited licenses would not make the HR staff, or any other department's employees, more willing to use it," says Director of Human Resources and Records

Management Officer Karen Briner–Peterson. “After a lot of research and deliberation, we decided Laserfiche would best suit our needs.”



J.M. Fletcher Elementary School

Once Laserfiche was installed, staff began with a pilot project to scan all personnel files into Laserfiche, with plans to eventually expand the project to other administrative areas and school buildings as resources and time allowed. The need for multiple file cabinets was immediately eliminated: staff designed their file structure to include five sub-folders (personnel, payroll, training, insurance and medical) set up so they could place security tags on confidential files. “Because all this information is confidential, we had to restrict access to everyone except the district superintendent and two of our assistant superintendents, who can access these documents through WebLink,” Briner–Peterson says.

And just as important is the peace of mind Briner–Peterson and her staff enjoy knowing Jamestown’s records are finally safe—come what may. “9/11 and Hurricane Katrina just proved the need to be able to continue running a business or government office immediately after a crisis,” she says. “Our largest concern was that we had no disaster plan in place. If water pipes broke or a fire started, we had no ability to recreate documents that could not be easily replaced.”

All of the district’s documents are retrievable through WebLink so that, in case of disaster, district maintenance employees, administrators and local police, fire and emergency personnel can immediately access information. In fact, Briner–Peterson is so confident in Laserfiche that she’s begun moving original hardcopy personnel offsite to the district’s new records storage facility. “Laserfiche is the foundation of our district disaster recovery plan,” she says. “Combined with our HR and payroll software, Laserfiche hasn’t just saved us time and money, but has also enabled us to be up and running at an offsite location within a matter of hours after a disaster.”

Beyond disaster recovery, some of the most noticeable benefits of using Laserfiche have come from staff expanding their use of the system into other areas, including

managing e-discovery, tracking the history of provisions in collective bargaining agreements and handling FOIA requests.

Laserfiche has also been used to store and display large amounts of data in litigation. “We were able to import documents into Laserfiche, bringing more than 500 pages of documents to court for dramatic effect,” says Briner-Peterson. “During testimony, the information being testified to can be projected on a screen in the hearing room for the entire court to see. Due to discovery requirements, we are able to provide the judge and opposing counsel with all documents admitted into evidence stored on one CD instead of storage boxes.”



[James Prendergast Library](#)

Laserfiche has proven even more helpful in managing collective bargaining agreements between the district and its seven employee unions. At times, Briner-Peterson explains, a union may bring a grievance alleging violation of a contract provision or the parties must go to arbitration to define a word or phrase in a collective bargaining agreement. “Last year, I was asked by our Assistant Superintendent to determine a history on a particular contract provision,” she says. “By doing a word search in Laserfiche, within twenty minutes I’d printed out the appropriate pages of the contract provision as the language evolved from 1973 to the present. Before Laserfiche, this would have taken several hours, perhaps even longer.”

It’s equally easy for staff to quickly respond to the numerous FOIA requests they receive each year. “Sometimes documents must be disclosed under FOIA, but contain information that is confidential and can’t be disclosed,” Briner-Peterson explains. As the district’s Records Access Officer, she used to have to manually redact each document. First, she’d copy the document and use a marker to black out any confidential information. “But because print below these marks can still be seen, I’d have to make an additional photocopy to ensure that no redacted information could be read,” she sighs.

But now, Briner–Peterson simply uses Laserfiche’s redaction tool to securely—and clandestinely—remove any confidential information. “I really like the ability to use a white instead of a black redactor, because it’s impossible for the reader to see how many words in a sentence were removed,” she says. “Although it may seem trivial to anyone who doesn’t handle FOIA requests, using Laserfiche to store and redact our documents helps us prove that we used our best efforts to comply with the law.”



Jamestown is home to the Lucille Ball–Desi Arnaz Center.

Briner–Peterson and her staff have been so inspired by the utility of their document management system they’ve come up with even more ways to use Laserfiche throughout the district. “Our confidence in Laserfiche enables us to reach out to other departments—so we continue to find new and innovative ways to use it,” she says. In fact, in recognition of their innovative and creative use of their Laserfiche system, the Jamestown Public Schools HR team was recently awarded with the Laserfiche community’s prestigious Run Smarter Award.

Briner–Peterson believes that any Laserfiche user can enjoy the same success—as long as they invest the time up–front in proper planning. “We’d tell anyone to start in one department and deal with a workable amount of documents. We started with a small number of users and basic functionality, but we’ve added users and more advanced functionality as time goes by and our system becomes even more critical to our operations,” she says.

“Once you’ve had successes in one department and can prove to others that the system is user–friendly, functional and dependable, you’ll have departments knocking on your door,” she offers. “In our estimation, the best—and most unexpected—benefit of Laserfiche has been that we’ve been able to use it for so many things that no one on our selection committee ever could have envisioned.”

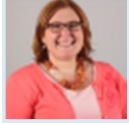
Unexpected benefits

While the district initially just planned a small pilot project to scan personnel files, staff soon found new and unexpected benefits from their Laserfiche system.

“Our reseller General Code provided us with a modular, scalable system we could build on as time and resources allowed,” says HR Director Karen Briner–Peterson. “In our estimation, the most unexpected benefit of Laserfiche is that we’ve been able to use it for reasons that our selection committee could never have envisioned.”

- **Managing the maintenance department’s documents.** Formerly disorganized architectural drawings, schematics and operations manuals are organized chronologically by school, so they’re easily accessible to maintenance employees, administrators and first responders in the case of a disaster.
- **Creating paperless Board of Education meetings.** Meeting packets could end up being several hundred pages long. Now, staff use Laserfiche Plus to create CDs of documents for each board member. Not only is less paper wasted, confidential information is more secure.
- **Simplifying the legal process.** The district’s HR director uses Laserfiche to easily store, present and disseminate information during legal proceedings. Documents are easily searchable, and are presented to opposing counsel on CD.
- **Tracking provision history during collective bargaining.** All collective bargaining agreements between the district and its seven unions are stored in Laserfiche. When a provision is questioned, applicable contract provisions are easily located in minutes, instead of hours.
- **Handling FOIA requests.** Instead of redacting paper documents by copying a document, blacking out information and recopying the document so redacted information can’t be seen, staff simply redact the document in Laserfiche. Using the whiteout redaction tool means that readers don’t see how many words or letters were removed.
- **Searching multiple documents.** Instead of manually searching 580 personnel files for requests to transfer, a simple search for the word “transfer” pulled up a list of teachers willing to transfer—in less than ten minutes.
- **Accessing permanent student record cards and transcripts.** Once permanent student record cards and transcripts are transferred to the District’s Records Center, they are scanned into Laserfiche. The information is burned to CDs and sent to the High School’s Guidance Department, as they receive the majority of these records requests.

“Our confidence in Laserfiche enables us to reach out to other district departments—so we continue to find new and innovative ways to use it,” says Briner–Peterson.



Melissa Henley Melissa is Director of Marketing Communications. She loves all things Laserfiche – especially the color orange! See what she's up to at [@ECM_marketteer](#)