Laserfiche ECM Blogs

Woods of Wisdom

Written by Laserfiche Staff

Running smarter sometimes means pacing yourself.

That's the lesson from 2008 Run Smarter Award winner Thurston County, WA. Until implementing Laserfiche in 2007, the rustic county, peppered as it is with forests and Puget Sound waters, was beset with what could best be described as information management logjams.

But in less than two years, Thurston County has evolved its use of Laserfiche from a pilot project handling backlog conversion to the backbone of a department-by-department phenomenon. In short, Thurston County has realized the very essence of what it means to Run Smarter.

The County must have heard other departments' pleas, because suddenly several departments' annual IT portfolios had requests for imaging systems. The County's IT Manager, Brian Ferris, stepped in with the authority from its Information Technology Committee (ITC) and Board of County Commissioners (BOCC), and the search for an enterprise content management (ECM) system was on.

Back in 2006, IT Consultant (and now Laserfiche Administrator) Bonnie Hilyard and appointed imaging committee members were given the task to look at bringing an enterprise content management system into the county for all the departments to use. There was additional urgency because the overflowing records building had already spilled over into a second storage building. "We were looking at possibly needing a third down the road, and we knew we had to stop the insanity," she recalls.

The imaging committee's vision for the County's ECM system was more than simply a virtual storage building. "The system would have to do more than address both our short-term and long-range needs for document imaging. We definitely needed an application that had open architecture, regional support, Web capabilities, document and records management as well as a powerful workflow engine," she says. "Plus, a

huge requirement was the ability to integrate with all of our existing business applications.

The County's initial goal was to meet current and anticipated business requirements for 10-15 years, promote efficiency of county operations, save the time and costs of filling public record requests, as well as to save storage space. Whatever system they chose would have to allow for decentralized use for all levels of staff through easy desktop access, as well as the ability to integrate primary business applications with the system—all while providing multi-level security features.

What Hilyard and the team were looking for was a solution as enterprise-wise as it was enterprise-wide. Where did she find one?

"The county identified requirements for an Enterprise Imaging system and then released a Request for Proposal based on those requirements. After an extensive review process which included matching the county's requirements with each proposal and visits to other jurisdictions in Washington and Oregon that used the proposed systems , we determined that Laserfiche was the best choice" Hilyard says.

"One of the biggest moves for us was to be able to certify the system we purchased with the State of Washington State Archives Certification process," she adds. "This certification would allow us to eventually destroy some of the paper documents that were scanned into the system—a big move for shrinking our storage costs." This was such a big move, in fact, that Hilyard and her team made sure only records associated with the records retention schedule set by the Secretary of State were added to their system.

Thurston County's Roadmap to Enterprise Adoption

Inspired by the initial success of the County's three department roll-out, Hilyard began adding other offices and departments she thought might benefit from Laserfiche. "At first I wasn't sure if everyone in the county was prepared to use this new technology—and boy was I wrong," she notes. "Now everyone wants it and they want it yesterday."

For starters, there's no more back-logs—or bad backs—in the **Sheriff's Department Warrant Department.** Before Laserfiche, staff transported 14 filing cabinets up and down the elevator from the Sheriff's Warrants Office to the jail intake facility twice a day so officers could physically verify civil orders and warrants issued after-hours. The elevator would break down-often during transport with staff and file cabinets in them—leaving the office with not just destroyed carpets, but also tired and injured staff.

Now staff in the warrants division scan documents into Laserfiche and jail staff use annotations and Workflow to move them from one location to the next until they are served, before they are stored in the records retention folders. Hilyard's team is currently working with VAR Vicki Pattle of VPCI to possibly link the state's District Court system with Laserfiche. "We are hoping that by the end of next year, District Court judges will be able to issue a warrant or civil order from their bench and it immediately puts a copy into Laserfiche."

Thurston County's **Payroll Department** used to need days, sometimes weeks, to verify a retired employee's length of employment for retirement benefits. Now using an API from Tyler/Eden, payroll records can be captured into Laserfiche and stored in the correct employee's folders. Adds Hilyard, "We use the Records Management module to move the documents from the active folders into records retention once an employee leaves."

And finally, Thurston County's **Auditor Finance Department** is in the process of purchasing a Tyler/Munis API to link the County's AP system with Laserfiche. "We will be implementing this project in 2009," Hilyard says. "Wish me luck!"

In the near future, Hilyard and her staff hope to add the County's **Roads, GIS, Health, Medic One, Parks & Recreation, Juvenile Detention, Sheriff's Office and Central Services Contracts** departments to the Laserfiche network. "I'm sure there will be others," she says, "but the requests from all of these departments are enough to keep me busy for the next five or ten years!"

Initial implementation was rolled out in three pilot offices: the Board of County Commissioners (BOCC), Prosecuting Attorney's Office (PAO), and Development Services Department (DevSvcs).

The BOCC had ordinances and resolutions dating back to the 1910s, as well as board meeting minutes that staff scanned into Laserfiche. Almost immediately, citizens and staff could search and print out documents themselves, which was a huge time saver for the board's secretary. Says Hilyard, "Now she scans them in and they are automatically posted to the Web with WebLink. She can then send an e-mail notifying everyone that it's posted, and she's done."

Next, Hilyard's team is installing Laserfiche in the PAO, mostly due to the office's sheer amount of paperwork. By law, cases must be kept for at least 20 years, but this retention period can stretch even longer when the appeals process is included. After an outside vendor scanned 3.7 million pages into TIFF files, Hilyard's team used Quick Fields to automatically import them into file structures organized by year. As the

documents were imported, Laserfiche's OCR engine automatically extracted searchable text, simplifying retrieval. In 2009, Hilyard says, the PAO hopes to be scanning the documents as they come in, but she's realistic about the process.

"We know that this transition will be hard on some staff, so we're not going to completely eliminate the 'safety folders' at this time," she says. "We're hoping the attorneys will see they can use their laptops to locate all the up-to-date paperwork for the case in the court room or office."

To help the effort, Hilyard's team designed a folder structure where each case has its own file folder so all subsequent incoming information could be routed to these folders by staff using Snapshot or through Laserfiche Workflow.

"We decided to go this direction because as a case is closed, Workflow will move the active folder to the Records Management module to begin its records retention," Hilyard says. The PAO has almost finished linking Laserfiche (through an application programmable interface (API) created by VPCI) with their Damion business application.

Next, Development Services Department technical staff and VPCI programmer are working together to create an API for their business application, Amanda, and Laserfiche using Web tools, a project, Hilyard notes, that is now 80% complete.

With pilot projects underway in the first three departments, Hilyard started looking across all departments to see who could benefit from the relatively new system. She admits, though, that for as inevitable and organic as the County's enterprise-wide adoption of Laserfiche seems now, it wasn't always easy.

"Implementing such a large scale roll out has been challenging for myself and our Records Manager. Keeping up with the demand for all the scanning requests has also been a big challenge," notes Hilyard. "It's amazing now that the cat is out of the bag how many people in the county are knowledgeable about this technology. I hear no negative comments about the implementation, just a lot of thanks."

Up next is exploring the possibilities of Laserfiche 8, which TC implemented just this month. "I'm hoping that maybe somewhere along the way I can find the time to learn how to use the Toolkit myself so that I can develop API's internally," Hilyard muses.

Somehow, she always finds time to sing the praises of Laserfiche to local governments. "I recommend Laserfiche on an ongoing basis. I share all my stories, documents and knowledge whenever I'm asked," she says.

"It's nice to have a community in Washington and Oregon State where we all get together and share. You know you're not alone and if it's something that can be done, maybe it's already done and I don't have to re-invent it."

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