



Paperless Case Management Leveraging Laserfiche and the Apple iPad

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With a staff of just 11, the IT department at the City of Wichita Falls, TX, serves nearly 1,400 city employees. Similar to their colleagues at many government organizations, these IT professionals are faced with the challenge of making sure that staff members are taking advantage of new technology to elevate the speed and quality of the service they provide to citizens.

“The biggest thing we fight,” says Patrick Gray, Database Applications Analyst at Wichita Falls, “is people getting stuck in their ways.” He explains that his department’s goal is to move employees off technology from the 1980s and ‘90s and “get our city current.”

To that end, the city’s selection of Laserfiche as its enterprise content management (ECM) system of choice has been a surprisingly good tool for motivating departments to upgrade their operating systems and other IT infrastructure. “The more people see what Laserfiche can do, the more they want it—and the more they’re willing to change the way they work to get it,” Gray says.

Choosing Laserfiche

Prior to implementing Laserfiche in 2010, Wichita Falls was overrun with paper. “We had the usual filing cabinets and bankers boxes stored away in various rooms maintained by various people,” explains Gray. “Records retention was rarely enforced, so the paper was stacking up and we were running out of storage space.”

Although two departments had legacy imaging systems in place, they were outdated, lacked vendor support and

didn’t offer ECM functionality such as records management, business process management or batch processing.

“When we put out our RFP in 2009, we cast the net wide,” Gray says. “We looked at functionality, but we were very careful to weed out companies that didn’t have a secure and stable future. We wanted a system that would be easy to use, administer and maintain, regardless of any staffing changes here at Wichita Falls.”

Working with MCCi, a Laserfiche reseller that specializes in local government solutions, the city implemented Laserfiche in its City Clerk’s Office in 2010. “Our City Clerk, Lydia Ozuna, is our records manager, so she’s responsible for making information available to both employees and residents, and for staying compliant with Texas State Library recommendations for records retention,” Gray explains.

He notes that having digital records available in Laserfiche makes the City Clerk’s job much easier. Documents like agendas, minutes, bids and newsletters are “readily available for staff to retrieve and research, saving the City Clerk a great deal of time and effort.” In addition, Laserfiche Workflow, a business process management tool included in the Laserfiche suite, automatically applies records retention schedules to digitized documents, simplifying compliance, reducing training time and eliminating mistakes.

Gray says that Ozuna is looking forward to the launch of the city’s new Website over the summer, which will take advantage of Laserfiche WebLink, a browser-based thin client, to allow citizens to download public documents off the Web. “She won’t have to post PDFs to the Website anymore. Users will have access to the records they need directly from Laserfiche.”

Paperless Case Management

After implementing Laserfiche in the City Clerk's Office, the IT department turned to the Municipal Courts, where it has been able to implement a paperless case management system using a combination of Laserfiche, Infosol and the Apple iPad.

In the past, court clerks printed documents from Infosol, creating hard copy files that were then processed manually and stored in an active filing cabinet until the case was closed. Once the case was closed, associated documents were moved to another filing cabinet for the five-year retention period.

Today, Wichita Falls uses Affinity to integrate Laserfiche and Infosol, allowing the courts to automatically import documents into Laserfiche without the need to print. When a document enters the repository:

- Laserfiche Workflow automatically moves it to the Active Case Files folder, where a Case ID file is created.
- Court clerks review the digitized document and enter metadata into the document template.
- Workflow renames the document based on its metadata and files it in the appropriate year directory.

"By eliminating the need to print records, we've regained a lot of space that used to house filing cabinets," Gray says, explaining that the Municipal Courts used to generate roughly 3,000 pages of paper a month, all of which had to be retained for five years according to Texas State Laws. "Even better, by decreasing the need for court clerks to find and file records, we've saved a lot of time!"

He notes that Workflow further enhances productivity by automating review and approval processes. For example, if a case file needs to be reviewed by the judge, the court clerk will update a template field in the case file, triggering Laserfiche to move it to a Review folder and notifying the judge by e-mail that the file requires attention.

By updating a template field when a case closes, court clerks kick off a workflow that archives and applies the appropriate retention schedule to the case documents. "Workflow is great because it saves time, cuts costs and leaves very little room for mistakes by end users. Once you've created a workflow, it basically does all their work for them," Gray says.

Municipal Courts judges access Laserfiche on their iPads, ensuring that they can view and act upon case files from wherever they are. "I love the mobility of this solution," says Gray, noting that Wichita Falls' full-time judge, Larry Gillen, uses his iPad so much that "he really doesn't even need his desktop anymore."

Gray is particularly excited about moving to a new court management system and adding wireless videoconferencing into the mix. "With access to Laserfiche and the new court management system on his iPad and the video conferencing in place, the judge will be able to administer remote judgments to prisoners at our downtown jail, decreasing costs while also improving the safety of our citizens since we will no longer have to transport prisoners to court."

Expanding across the Enterprise

Vital Records is another heavy Laserfiche user. Using Laserfiche Quick Fields, a high-volume capture and processing tool, Vital Records batch scans birth and death certificates. Gray notes that, before Laserfiche, scanning a year of birth certificates into the department's legacy system took about a month. Today, it takes two days.

"Laserfiche has exceeded everyone's expectations," he says. "We currently have a 50-user Laserfiche Avante system, but we're looking to upgrade to Laserfiche Rio so that we can continue to expand our system to accommodate the demand from our users."

Additional departments currently using Laserfiche include Purchasing, Risk Management, Finance and HR. According to Gray, "Installing Laserfiche within various departments has been easy, and troubleshooting has been a snap, especially with the quick response times of the Laserfiche tech support team."

He notes that Budgeting will get Laserfiche next, followed by the police and health departments. The city is also planning to integrate Laserfiche with its finance and HR software.

"In just two years' time, we've accomplished a lot with Laserfiche," Gray says. "People are excited about this software. Now, when they come to me with requests, I have to tell them to take a number and get in line!"

About Laserfiche

Since 1987, Laserfiche has used its Run Smarter® philosophy to create simple and elegant enterprise content management (ECM) solutions. More than 32,000 organizations worldwide—including federal, state and local government agencies—use Laserfiche® software to streamline document, records and business process management.

Your Next Step

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