

**LASERFICHE ENTERPRISE CONTENT  
MANAGEMENT SYSTEM  
IMPLEMENTATION UPDATE**

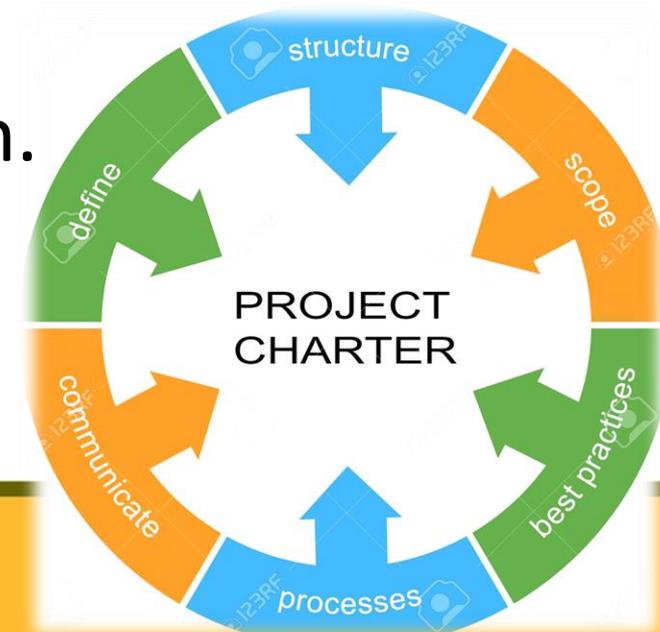


# Outline

- Review of the Project Charter
- Update on work completed
- Establishment of the Ongoing Success Committee
- Contract Management

# What is a Project Charter?

- Defines Issues and Opportunities.
- Defines Requirements for Successful Completion.
- Outlines Contingencies and Risks.
- Establishes Measures of Success.
- Impacts of Successful Completion.

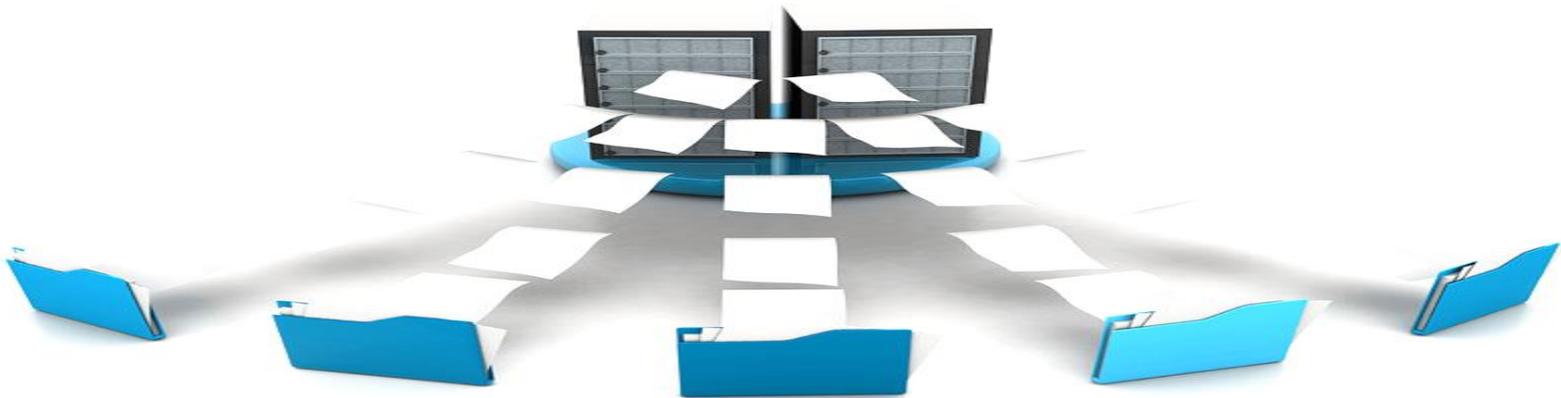


# Structure Creation

- First Step: Focused on Implementation
  - Implementation developed the storage structure for each departments documents.
  - Document retention dates were assigned to each document type.
  - Training on how records retention works, based on process and software functionality was held.
  - Over 500 document types were identified.

# Data Conversion

- Second Step: Focused on Data Conversion.
  - Water, Public Works, Police, City Clerk and Finance all had documents converted.
  - Data conversion has been completed in early March
    - 450,000 documents migrated.

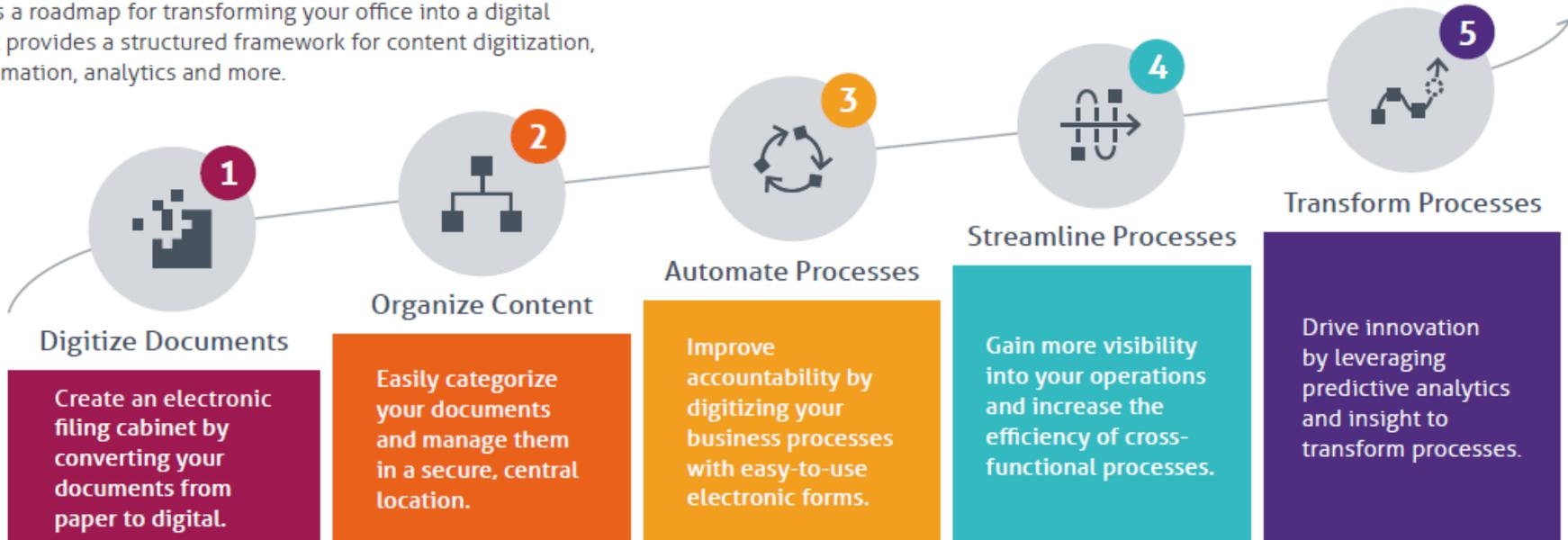


# Digital Transformation Model

## Digital Transformation Model

Laserfiche®

This model is a roadmap for transforming your office into a digital workplace. It provides a structured framework for content digitization, process automation, analytics and more.



# Digital Transformation Progress

**Laserfiche**

**Fleet Asset Tracking Form**

**Form Type\***

New Vehicle  New Equipment  Transfer  Disposal

**Asset Details**

**Tag Number\***

**Unit Number\***

**Total Capital\***

\$

**Life Cycle\* (?)**

**VIN\***

**Year\***

**Make/Model\***

**GVWR**

**Department\***

**Vendor Name\***

**GL Account**

**Notes**

# Digital Transformation Progress, Completed

**Laserfiche** Fleet Asset Tracking Form

**Form Type \***  
 New Vehicle  New Equipment  Transfer  Disposal

**Asset Details**

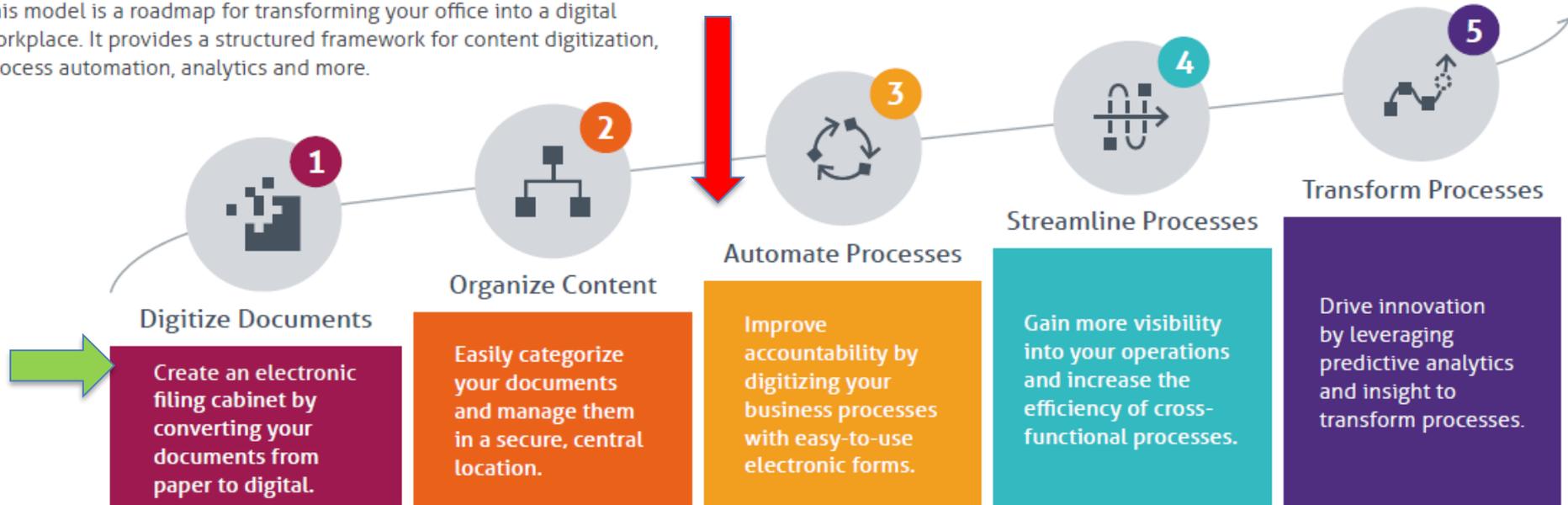
<b>Tag Number *</b> 20392	<b>Unit Number *</b> 2
<b>Total Capital *</b> \$ 29,398.00	<b>Life Cycle * (?)</b> 8
<b>VIN *</b> 1FT7X2B68MEC11060	<b>Year *</b> 2021
<b>Make/Model *</b> FORD F-250	<b>GVWR</b> 10,000
<b>Department *</b>	<b>Vendor Name *</b>

# Digital Transformation Progress

## Digital Transformation Model

This model is a roadmap for transforming your office into a digital workplace. It provides a structured framework for content digitization, process automation, analytics and more.

**Laserfiche®**



# What Didn't Go as Planned?

- Remote work.
- High level of understanding of the benefits of the system.
- 'My documents' not 'Our Documents.'
- Developing the Business Processes behind documents.
- Some Risks outlined in the Charter were realized.

# What Went Well?

- High level of engagement (interest) from department staff involved in the project.
- Our Contractor (OPG-3) has been *very* good to work with.
- Few problems with availability of department project staff during a difficult year.
- Later Understanding of Our Documents vs My Documents.

# Formation of Sustaining Committee

- Called for in the Project Charter
- Representatives from all departments/divisions
- Allows for staff information exchange and sharing
- The group will be tasked with identifying future needs and prioritizing those efforts.



# Committee Responsibilities

- Develop a set of standard forms for documenting future additions to the tools.
- Develop a list of document sets that need to be digitized.
- Regularly reprioritize the backlog.
- Establish organizational training needs.

# Contract Management

- A segment of the original agreement.
- Intended to address an identified area of improvement.
- Designed to be a learning opportunity with a needed product at the end.

# Key Features of the Solution

- Forms based submission of executed contract documents.
- Will maintain host and subordinate agreements.
- Automatic Expiration/Renewal notifications.
- Automatic Assignment of Retention Rules.
- Searchable Based on Access Rights.

# Contract Management as Part of Digital Transformation

## Contract Import



Please fill out the following form to begin the contract import process.

### Employee Information

Email\*  Department\*

### Contract Information

Company/Entity\*  Contract Title\*   
Contract Status\*  Type

Description of Contract\*

Effective Date\*  Expiration Date\*  Renewal Notification\*

Contract\*   
Pay Options Form.pdf 94.45KB x

Supplemental Documents



# Contract Management as Part of Digital Transformation

## Search Results



Please indicate what contract business process you would like to initiate on the contract(s) below. A form may be submitted with all contracts marked as "None."

Search For All Contracts

### Search Results

ID	Company/Entity	Title	Status	Effective Date	Expiration Date	Action* (?)
72868	OPG-3	Year Support	Executed	3/31/2019	3/31/2020	None ▾
72883	Housing LLC	Rental Agreement	Executed	3/31/2019	4/15/2020	None ▾
72877	Consultant INC.	Temporary Consultant	Executed	3/1/2020	4/30/2020	None ▾
72864	Xerox	Year support	Executed	1/1/2020	1/1/2021	None ▾
72858	Comcast	Comcast Business	Executed	4/1/2020	4/1/2021	None ▾
72889	Ace Hardware	Leasing of Tractor	Executed	4/1/2020	4/1/2021	None ▾
72873	Consultant INC.	Website Maintenance Contract	Executed	4/1/2020	4/1/2022	None ▾

7 results found

Comments

# Important Aspects of the Solution

- Contracts are department *and* organizational documents.
- Regardless of the source, route, or process all agreements need to be centrally stored and easily retrievable.

# What Happens Next?

- Structures are in place, push adoption and use down into departments business processes through the use of Forms and Workflow.
- Leverage the Committee to facilitate and prioritize desired improvements to the software.
- “democratize” development, based on knowledge and ITS ability to support.