

## City of Temecula

### *Laserfiche Bubbles Over in the Heart of Southern California Wine Country*



The City of Temecula is in southwestern Riverside County and serves a population of over 110,000 residents. Known as a tourist and resort destination, Temecula is home to many wineries, golf courses, the Pechanga Resort and Casino, and the Temecula Valley Balloon and Wine Festival.

In the early 2000s, the City of Temecula had amassed hundreds of boxes of unorganized documents. The city quickly recognized the need for a solution and in 2001 ECS installed Laserfiche, the city's first digital content management system, with 25 Users.

The City has come a long way since then, growing with the software over the years and leveraging most of the tools at their disposal.

ECS provided services to upgrade the City's Laserfiche system to Laserfiche Avante in 2014 and in 2022 assisted the City in upgrading their system to Laserfiche Rio, which now includes 25 Full Users, 40 Participant Users (users who can search and view documents in the repository and participate in Forms processes such as Public Records Requests), Starter Audit Trail, Weblink Public Portal for 2 Laserfiche Servers, Workflow, Forms Professional, Forms Portal, Quick Fields Core, integration with DocuSign, and Cloud Hybrid Services including Direct Share. They currently have more than 25 active forms and over 10 active workflows.

City staff already working in Laserfiche took a unique approach to increasing use of the system throughout the City. When a help ticket was submitted, relevant inquiries were followed up with examples of similar solutions designed in Forms and Workflow for other departments. This "Strike while the iron is hot" method motivated other departments that were reluctant to explore products for which they had no active or pressing issues to resolve or improve. Laserfiche is now being used in the City Clerk, Human Resources, IT, Community Development, and Fire Prevention Departments.

Laserfiche has solved many of the City's needs by providing the tools capable of creating and transforming processes and workflows with minimal change management and large gains in efficiency. The return on investment was clear and present in every listed aspect and more with no foreseeable diminishment. Overall, there was a large reduction in time from request to completion including:

- Reduced staff hours spent searching for and providing documents for public records requests due to Weblink and online availability.
- Reduced staff hours spent printing, transferring, scanning, and organizing records that are now digitally transferred, often using workflow automation that also assigns metadata.
- Reduced staff hours spent gathering wet signatures for Onboardings, Access Changes, Equipment Requests, etc. as well as a reduction in multiple submittals due to typos, errors, and omissions.
- Reduced staff hours spent on historical research due to quick metadata search capabilities within the repository.

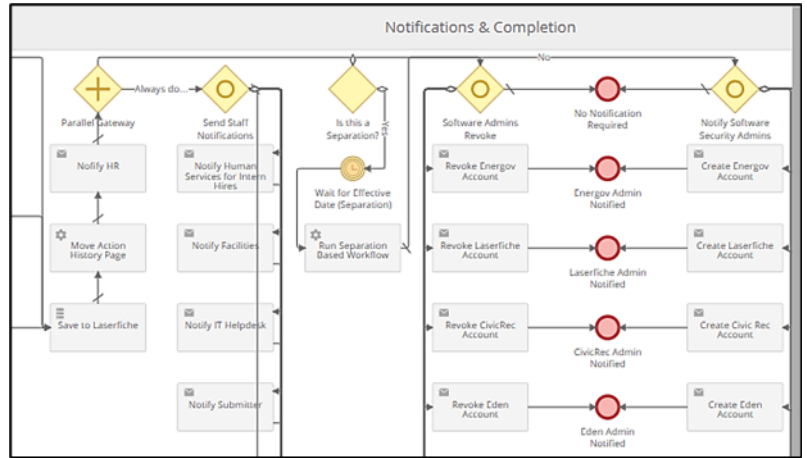
Using Forms and Workflow, the City has been able to automate the Personnel Status Change process for employees. Before the automated process was implemented, the form was printed and physically routed to each department for review and approval.

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This was time-consuming, and the Human Resources staff often had to track down who was reviewing while the IT Department did not always get the information needed to set up the new employee. With the automated process in place, Workflow performs a look up to the ERP database and generates a helpdesk ticket and saves the form to the repository. Emails are automatically sent to Software Administrators, Finance Department, and the Device Manager.

The City has also implemented a Benefits Enrollment process that allows employees to select their health benefits including vision and dental coverage.



With the addition of the Accounts Payable Invoice Processing Workflow in Laserfiche, the City has been able to upload Invoices with Laserfiche Forms, automatically extract metadata with Smart Invoice Capture, automate and route Invoice approval with email notifications, keep track of what is being paid, and reduce late fees.

With the automated Public Records Request process, the City has been able to control duplicate requests, better collaborate across departments, and establish improved tracking, accountability, transparency, and reportability to meet deadlines.

The Records Retention process has been improved with easier Record Life Cycle tracking and reduced time and space with automatic notifications of document destruction dates. With this, they can hold onto only the records they need.

By automating the Contract Management process, the City now has a smooth and simplified process with secure access to only the right people for improved contributor accountability.

Another distinctive solution came when the City implemented a custom workflow to import records and associated metadata from their Enterprise Permitting and Land Management software into the Laserfiche repository. The import occurs only when the record is designated with the status of "Finald".

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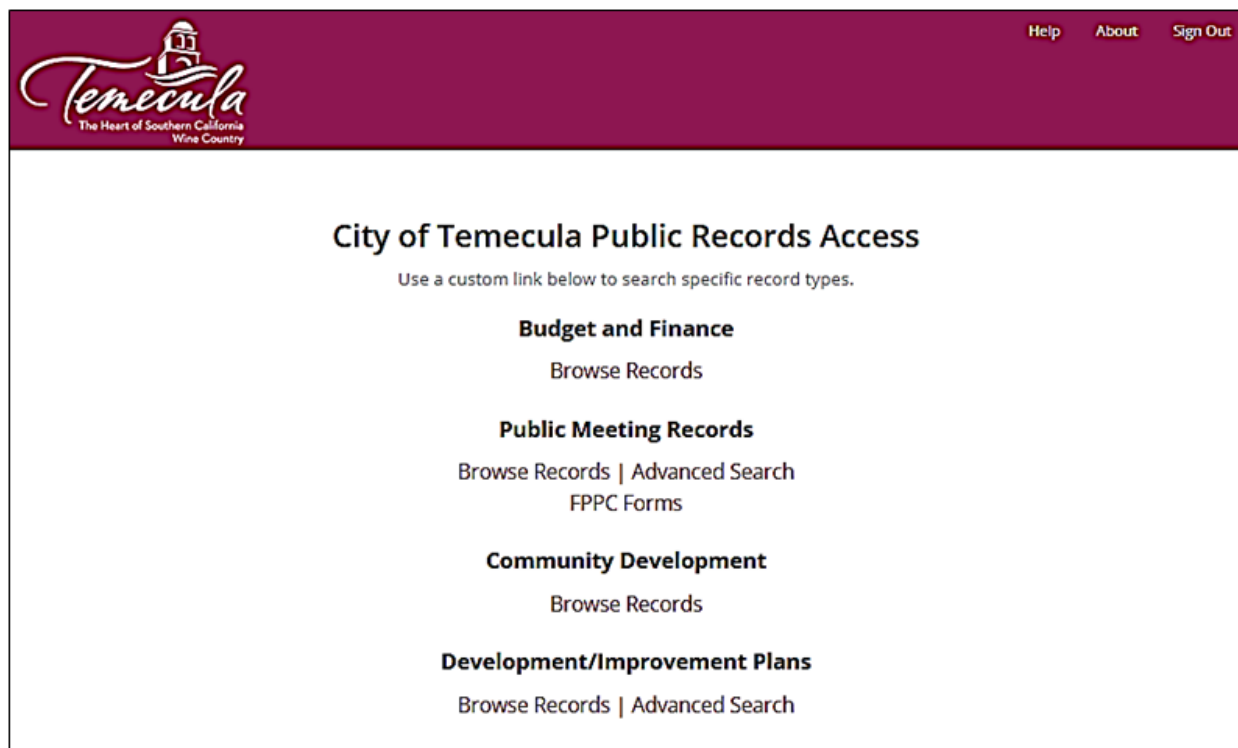
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Hunter Howe, Senior Enterprise Application Specialist, has plans for Laserfiche which involve automating all plan and permit records to be available online within 30 days of finalization with effectively zero manual staff effort (scanning, paper transfers, metadata, etc.). He also wants to work with the City's GIS (Geographic Information System) team to create their own purpose-built map to serve records online based on address and/or parcel number so that the public can search documents relating to a specific location. Integration with DocuSign, Tyler Energov and Tyler Munis are also in the works.

Hunter emphasizes this advice for organizations just starting out with Laserfiche; build a solid foundation, be thoughtful about how you design your repositories, folder structure, templates, and metadata fields. If public record transparency is your goal, build and name documents and searches in a way that makes sense to your citizens. Don't overdue your metadata. Only include metadata that will be useful for searches or workflows and use fixed dropdown lists and constraints where possible to maintain consistency. Laserfiche is a powerful necessity backed up by strong support from ECS Imaging.

**Link to City of Temecula Public Portal:**

<http://laserfiche.cityoftemecula.org/WebLink/Welcome.aspx?dbid=2&repo=Temecula>



**City of Temecula Public Records Access**

Use a custom link below to search specific record types.

- Budget and Finance**  
Browse Records
- Public Meeting Records**  
Browse Records | Advanced Search  
FPPC Forms
- Community Development**  
Browse Records
- Development/Improvement Plans**  
Browse Records | Advanced Search