City of Dublin
Laserfiche Automation at the Crossroads of Convenience and Efficiency

Long known as the crossroads of the San Francisco Bay Area, the City of Dublin, CA is in Alameda County at the point where two major highways intersect: Interstates 580 and 680. The City got its name because of the large number of Irish who lived there, the name was officially accepted in 1890.

The City has been an ECS customer for almost 20 years starting with a legacy version in 2004. In 2020, the City Council adopted a two-year strategic plan including a strategic initiative to become a 24/7 City Hall to enhance resident and business engagement. This goal drove the City to upgrade their Laserfiche Rio platform in 2021, allowing the City to make full use of their System with 55 Full Users, 76 Participant Users with repository read-only ability. This upgrade included forms functionality, Forms Pro and Forms Portal, **Weblink Public Portal**, Import Agent, and an integration with DocuSign. The upgrade gave the City access to much more functionality, as well as more robust security features, such as Single Sign-On. The increased access to licensing allowed all employees to have their own license to access what they need and accomplish their tasks quickly and more efficiently. Laserfiche is now a standard software for all employees and is being used by all departments City-wide.

One of many projects ECS worked with the City on was to update their Contracts Management Process using Laserfiche Forms and DocuSign.

♦ The process starts when Staff starts a form, including uploading a Microsoft Word version of the agreement, and other supporting documents.

♦ The Form includes an upload field for various types of insurance documents and a dropdown field for selecting an existing vendor.

♦ The process also includes reminder workflows, alerts, and notifications that provide more information such as the following statement 'Delays cannot occur while a file has already been sent for signature'.

♦ Once the Contract is approved, the City uses the Laserfiche out-of-the-box DocuSign integration for signature routing.

For the City, the benefit of using Laserfiche Forms is they can be completed online and saved directly into the Laserfiche Repository when submitted instead of having to download a PDF file from the City's website, completing the form by hand, and mailing or emailing it to the City. Starting processes with an electronic form allows the City to eliminate paper altogether and ultimately save the City money on physical storage costs, as well as improving their green footprint. While records storage space is available at the Corporate Yard, the City does not need to fully utilize it because the majority of processes are now done electronically. Because most of the City's records are now digitized, City staff can also respond faster to Public Records Requests.
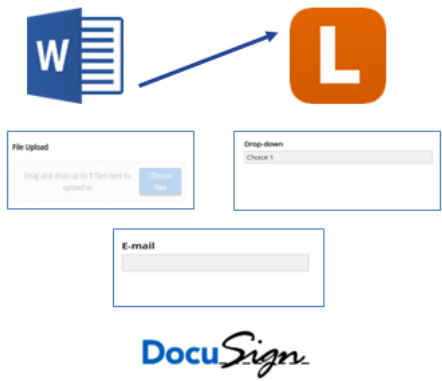

City of Dublin
20 Years of Laserfiche Efficiency

LASERFICHE RIO SELF-HOSTED

Retention Workflow
Contracts Management
   Forms Process
DocuSign Integration
CA Trusted System

55 Full Users
76 Participant Users
Weblink Public Portal
Forms Portal
Forms Professional
Import Agent
DocuSign Integration

Contracts Management Process

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Contracts Management Review

DUBLIN
CALIFORNIA

Contract Information

Contract Type*
○ City Standard Template   ○ Non-City Template

Attach Contract*

Drag and drop files here to upload or
Upload

Date
Date will be captured on form submission

Contact Name*

Department*

Contract Description*

Vendor Name*

Eden Vendor # (If known)

City Council Meeting*

City Council Meeting Date*
M/D/YYYY

Document Date*
M/D/YYYY

The City continues to scan paper and import documents into the system allowing them to destroy paper following a destruction after imaging process. Additionally, they can update metadata to make searching for and locating documents easier and more efficient.

With the automated retention workflow developed by ECS, the City can manage the retention of electronic records and destroy electronic documents based on the City's Records Retention Schedule. A report is sent to the City Clerk's Office notifying them of what records are eligible for destruction.

The City has been able to increase buy-in and expand use of the system by looking at how Laserfiche can benefit each Department to better utilize staff time. Additionally, they have a group of records representatives that meet quarterly, and they assist in training staff in their departments.

Each new employee receives an email from the City Clerk's Office with login information and links to videos of previous trainings, followed up by a in-person check-in and introductory training. The City Clerk's Office maintains an intranet page with links to the training material and additional training information. This past April, the City did additional training for staff during Records and Information Management Month.

The City's next steps for Laserfiche include:
- ◆ Tyler Energov – Laserfiche Integration
- ◆ Updating Contracts Management with process enhancements and DocuSign iFrame integration
- ◆ Upgrading Assureon WORM device and new secondary back-up with RestorVault which is WORM in the Cloud.
- ◆ Possible Integration with Tyler Munis (Finance application)
- ◆ Possible Integration with NeoGov (Recruitment application)

According to Marsha Moore, City Clerk, "We have enjoyed our partnership with ECS on our projects. Sanger and the project team have been fantastic".

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