

City of Aliso Viejo

A 21st Century City Maximizing 21st Century Technology with Laserfiche



The City of Aliso Viejo, Spanish for “Old Sycamore”, is in the San Joaquin Hills of southern Orange County and services a population of over 52,000 residents. Shortly after they incorporated in 2001, they enlisted ECS Imaging to provide the Laserfiche content management system to archive and manage their documents from inception.

ECS installed a Laserfiche on premises version in 2002 and has provided scanning and microfiche

conversion services for many departments including Building and Safety, Public Works, Planning, and City Clerk. Nearly 20 years later we migrated them to the Laserfiche Cloud platform in 2020 fortunately just before COVID-19 hit. The Cloud put them in a better position to offer services in an efficient and on demand way while streamlining the maintenance of having a system hosted on premise.

Overview of the City’s Laserfiche Cloud solution:

- Laserfiche Cloud Business Tier with 25 Full Users and 20 Forms Participant/View Users
- Weblink Public Portal for public facing documents
- ECS Tyler EnerGov Integration
- Warrant Request Invoice Approval with Forms and Workflow
- Covid Forms Configuration
- Public Records Request Automated Forms Process
- Contract Management (in process) with Forms and Workflow

At the beginning of the Coronavirus Pandemic, The City needed a Community Outreach Form to allow local businesses to submit more information about their needs and services during the COVID-19 Pandemic. Since ECS Imaging was well-prepared to support the City’s needs during the COVID-19 Pandemic, we were able to gather the information and requirements necessary to create 2 Forms that the City desperately needed. The requirements were collected, and Forms were completed in one business day.

COVID 19 Community Outreach Form: <https://portal.laserfiche.com/s0923/forms/covid19internal>

In addition to the COVID related Forms, ECS worked with the City to build and implement a Public Records Request process with Forms and Workflow. This process allowed the City to control the process of gathering the requested records more efficiently. This part of the process usually took time because records were dispersed throughout the City which made responding to requests more time-consuming and increased the possibility of error.

Public Records Request Form: <https://portal.laserfiche.com/s0923/forms/RecordsRequest>

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At a Glance

Departments Using Laserfiche
All 10 Depts.

Total Number of Laserfiche Users
45 Users

Length of Time Using Laserfiche
Since 2002

Laserfiche System and Uses

Laserfiche Cloud Business Tier
25 Full Users and 20 Participant Users

Tyler EnerGov Integration

Contract Management (in process)
with Forms and Workflow

Warrant Request invoice approval
with Forms and Workflow

Covid Forms Configuration

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ECS also worked with the City to design and implement a **Warrant Request Invoice Approval** with Forms and Workflow. The **Invoice Processing solution** utilizes a database lookup from Tyler Incode to help populate Vendor Names, Vendor Numbers, General Ledger Accounts, and Project Numbers. After submittal and approval from the Finance team, the invoice along with supporting documentation is stored in the Cloud repository. Saved searches and reports can then be pulled from Laserfiche for ingestion into Tyler Incode.

Challenges Faced:

- 1. Central Repository Access:** The need for a centralized system made managing and retrieving documents efficiently difficult. This resulted in time-consuming processes for staff and reduced the organization's ability to respond quickly to internal and external requests.
- 2. Public Records Requests:** Handling public records requests took time due to the dispersed storage of documents. This made responding to requests more tedious and increased the risk of error.
- 3. Management of EnerGov Permits:** With a central repository, retrieval of EnerGov permits is more accessible from all departments.
- 4. Workflow Efficiency for Critical Documents:** The absence of automated workflows for critical documents like warrant requests created bottlenecks in finance and other departments, especially during COVID-19, affecting the timely execution of tasks and overall operational efficiency.

Solutions Provided by Laserfiche:

- 1. Centralized Document Management:** ECS and Laserfiche provided a central repository for all documents, making them accessible to authorized users across the organization. This has streamlined document retrieval and management, improving operational efficiency and response times to document-related queries.
- 2. Streamlined Public Records Access:** With Laserfiche, our organization has been able to automate and streamline the handling of public records requests. The system ensures that documents are easily accessible, enhancing transparency and compliance with public information regulations.
- 3. Integrated Permit Management:** Integrating EnerGov with Laserfiche has centralized the storage and management of finalized permits. This integration has improved the availability of permit-related documents.
- 4. Automated Workflows:** Laserfiche has enabled the creation and implementation of automated workflows for critical documents. This means faster processing times, reduced errors, and better compliance with financial controls for finance-related warrant requests.

Laserfiche has significantly enhanced their content management capabilities by providing robust document retention features, streamlining operational efficiency, enabling automated workflows, and reducing reliance on paper. Its powerful retention tools ensure compliance with industry-specific mandates, allowing them to manage records precisely and securely. By automating key workflows, Laserfiche has improved process efficiency, reducing the time and effort required for document handling and administrative tasks. Automation, combined with a reduced dependence on physical documents, has led to cost savings.

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Overall, Laserfiche has addressed the initial challenges by providing a robust document management solution that enhances data security and compliance and improves the overall efficiency of document-centric processes within the organization. This transformation has enabled better resource allocation, faster response to internal and external demands, and a significant improvement in service delivery to the community.

To increase buy-in for Laserfiche as it expanded to new departments, the City's strategy involved conducting proof of concept demonstrations and clearly showcasing the system's benefits. By implementing pilot projects in selected departments, City staff demonstrated how Laserfiche could streamline operations, enhance document accessibility, and reduce manual processes. Engaging department leaders early in the process and providing hands-on experiences with Laserfiche also played a crucial role in building support and easing the adoption across different parts of the organization.

"I just wanted to share with you my experience with Sanger and Raymond over the last number of months. In addition, wanted to express my deep appreciation for the remarkable effort and expertise they exhibited to complete an almost impossible task in the time frame our City had to work with. They not only have an exemplary work ethic but also an exceptional ability to integrate seamlessly with our team, a quality that greatly enhances our operations. In the realm of IT, where the stakes are perpetually high, they showed an impressive grasp of our specific needs. This insight was pivotal, considering the nuanced nature of our project. Their ability to foresee our needs/requirements, sometimes even before we articulated them, speaks volumes about their commitment and proactive attitude," Isaac Aziz, IT Manager.

He went on to say, "In recognition of Sanger and Raymond's outstanding performance and the key role they play in the synergy between our organizations, I felt it imperative to convey our appreciation to you directly. Thank you for fostering such talent within your organization and for placing our City in good care. We look forward to continuing and growing this mutually beneficial partnership."

"Lastly, I would like to say, ECS and their support team have tailored the Laserfiche system to meet our needs. Their expertise and responsiveness have greatly enhanced our experience, ensuring we could effectively maximize Laserfiche's benefits. ECS's commitment and their hands-on support during implementation and beyond have significantly impacted how seamlessly we've integrated Laserfiche into our daily operations."

Isaac Aziz contributed to the content of this story.