



Clerk's Office Leads ECM Revolution

The Town of Brookhaven covers 326 square miles of Long Island and is home to over 500,000 residents. The Town Clerk shoulders a tremendous responsibility as keeper of all records produced by the Town's 47 departments in the ordinary course of business. Brookhaven utilizes Laserfiche as its Enterprise Content Management (ECM) System to increase record access and help maintain compliance with NY State Archive record retention requirements.

Almost 20 Million Records Available In An Instant

Town Clerk Donna Lent was appointed project manager for the Town's \$6.7 million back-scanning initiative shortly after arriving in 2010 as Chief Deputy Town Clerk. She's continued to shepherd the Laserfiche system's growth as Town Clerk in her drive to serve constituents more efficiently. "When I started here at Brookhaven, we had 11 Laserfiche licenses," she said. "That's grown to 425 licenses which allow users to access almost 20 million documents, some dating back to the 1800's. And we are adding automated workflows and using eForms to streamline our processes at an accelerating pace."

An Organized On-Ramp to Structured Storage

The use of Laserfiche requires the digitization of records by capturing the images and inputting relevant metadata into the system. Town Clerk Lent established a Central Scanning Repository to facilitate scanning, indexing and quality review of records for various Town Departments. Here, Town employees perform back scanning and day-forward scanning directly into Laserfiche.

The Town Clerk's management staff works with each Department to establish a playbook – the set of rules by which records are entered into the ECM System – for each individual record type. Departments are responsible for prepping their records, ensuring that all necessary documents are in proper order. The records are then delivered to the Scanning Repository where the digitization process occurs.

Processing schedules vary according to the needs of each Department. For example, Finance Claim vouchers are scanned biweekly on a batch basis based on their completion date while Burial Permits are scanned every six months. Certain Departments, including the Town Clerk's office, are trained to scan their own records in real time. For instance, the minutes and resolutions of Thursday evening Town Board meetings are scanned by Town Clerk staff for availability by the afternoon of the following business day.

Workflows Aid Records Management Processing

Scanning and indexing enables desktop and Laserfiche WebLink portal access to records. Laserfiche workflows are used to manage quality control reviews of images and metadata by departments and the records retention manager. In certain instances, Laserfiche Workflow utilizes QuickFields to auto-populate metadata and reduce the data entry burden. Additional workflow automatically applies retention schedules for records management in accordance with the New York State MU-1 compliance schedule.

The Benefits of Digital Add Up

As shown in the examples that follow, the Town continues to find ways to improve efficiency and service with Laserfiche and ECM.

- The scanning of 400,000 Building Parcel Cards eliminated 12 seven-drawer file cabinets, opening up space for two workstations and a large-format map scanner.
- Turnaround time for processing of FOIL requests in the Law Department was cut by an estimated 70 percent. Where research once took hours, it may now take minutes.
- A workflow is set to review contracts on a nightly basis to identify expired contracts, update the template of those contracts to log the contract's expiration and apply the proper 6-year retention to the records.
- The Town Clerk launched a web portal that enables funeral directors to order and pay for copies of Death Certificates, in compliance with State law. The solution eliminates trips to the Clerk's
- Office for funeral home staff and reduces the queue at the department's walk-up service counter.
- The Clerk's Office is using Laserfiche to simplify the management of complex, permanently retained subdivision development records, including zoning, road dedications, curb cuts and more.

Continued on Back

-
- The use of Laserfiche Mobile will empower Town employees to search for records out in the field as they would on their desktops in the office to work more efficiently and better serve the Town's constituents.
 - Laserfiche houses an electronic inventory of archived records that were digitized and stored in the Town Clerk's Record Center.
 - The Town Assessor's office plans to utilize workflow to streamline the processing of STAR Enhanced applications, including confirmation, receipt processing, and storing of the applications within
 - Laserfiche. This more efficient process will allow a faster response time to residents.
 - The Central Scanning Repository has scanned, indexed and reviewed the multi-year backlog of Building records to help bring the Building Department up to date with electronic images of permits, licenses and certificates.

ECM Efficiency is The Name of Her Game

Town Clerk Lent points to her record digitization accomplishments with pride. "The number of full-time people in this office was reduced since I first arrived, so not only are we doing more with less, we're also being more efficient." With almost 20 million documents available at the click of a mouse, her implementation of Laserfiche will continue to make a major contribution to timely Enterprise access to information across all Town departments.

A Team Effort Underpins Sustained Growth

The Town's success with Laserfiche is tied to its commitment to support ongoing implementation. While Town Clerk Lent continues to provide vision, energy and direction, she's built a team to support her ECM initiatives. The Deputy Town Clerk and Executive Assistant oversee daily operations, ongoing projects and the accurate application of the retention schedule to all records in Laserfiche. The team also includes four employees in the Town's Information Technology Department, who have focus areas in security and folder structure integrity, workflow creation, forms design and user training.

While ICC Community Development Solutions was instrumental in Brookhaven's implementation of Laserfiche, the Town has invested in its team to enable it to provide a high level of service to departments. Town Clerk Lent advises other municipalities seeking to maximize their investment in Laserfiche to attend as many presentations, workshops, and training sessions as possible. "You will find something new and useful each time," she said, "Our IT staff attended workshops at Laserfiche's annual Empower Conferences and learned how to develop workflows and implement best practices." Several staffers also traveled to ICC Community Development Solutions' offices in Rochester for training with the company's solutions architects.

ICC Community Development Solutions

781 Elmgrove Road | Rochester, NY 14624

Toll Free: 855.436.2633

www.iccsafe.org/CDS

Helpdesk: 855.436.5500