

Tompkins County Laserfiche User Group Meeting Minutes (TSSERR)

Monday, June 20, 2016 – 9:30 a.m.

Meeting Location: Town of Ithaca – Town Hall

Present: See Attached Sign-In Sheet

Special Guests: Melissa Henley and Katie Burke from Laserfiche and Liz Mistretta from General Code

Welcome and Introductions:

Tompkins County Clerk Reynolds welcomed everyone to the meeting, and then introductions were made by everyone.

Laserfiche 2016 Empower Conference Follow-Up and Attendees Experience:

Everyone that went on the trip to California to attend the 2016 Empower Conference related what they learned and enjoyed about the conference. One attendee's comment that seemed to resonate around the room about it was "*If you think it, Laserfiche can do it!*"

Welcome From Joe Mareane, Tompkins County Administrator:

Mr. Mareane spoke about the positive impact of Laserfiche on Tompkins County and local municipalities that are part of our TSSERR group. He praised Laserfiche's trustworthiness and innovative thinking in meeting the many and various needs of this group. He believes that the reason it is working so well for everyone is that the staff at Laserfiche really take the time to listen, find ways to help us towards our goals, and that really has helped with the major success of this county-wide program for everyone that uses it. The staff at Laserfiche work with us to adapt their products to meet our needs and that has been really important.

Mr. Mareane further noted how impressed he has been with everyone in our group to make sure that communication between all of us is kept open and everyone keeping an open mind about new ways to perform old duties that will make all of our jobs so much easier in the future. He praised the staff of the Tompkins County Clerk's Office, particularly Tompkins County Clerk Reynolds and Deputy Clerk Congdon for their complete focus, and visionary plans for how Tompkins County can have a role in making Laserfiche do as much as it can for not only the County but the other local municipalities which keeps the benefits high and the cost low. He expressed his high appreciation and respect for Ms. Reynolds and Ms. Congdon because they are wonderful to work with, their hard work ethic is brilliant, and their efforts have proved exceptional in moving the use of Laserfiche through not only the many departments of Tompkins County but also the many clerk's offices around the county. He has learned through his work with the County Clerk's office that it is best if he gets out of their way and lets them do their work and to make sure they take the credit they deserve. They are both very congenial and welcoming which has really made this a successful group, and shown that it is possible for different government offices within the County to work together to consolidate and share services in a very positive and productive way. He is very proud of the work of this group and the congeniality everyone has towards one another.

Tompkins County Clerk Reynolds reported that our Laserfiche projects have been getting noticed in Albany. She is working on another grant application “Shared Services Municipal Restructuring - Including Disaster Recovery”. Now that Cortland County has joined our municipal shared services group, the grant money would be used to help scan and consolidate their records into Laserfiche. Money will also be used towards network storage sharing so that Cortland County will be able to provide back-up network services to Tompkins County and vice versa. This puts both counties in a much better position

Tompkins County IT Director Potter reported that he sits on the Local Advisory Board of New York State Archives where a resolution was just approved which would disallow any sweep of funds from the State’s grant program. The funds in the grant program are from various fees collected by county clerks’ around New York State. The past practice had been that the Governor would take close to \$1 million of that money for purposes other than grant funding every year. This new resolution disqualifies that pot of money from being removed by the Governor. He also noted that grants being applied for now are more likely to get approved if they include proposals for shared services.

What’s New in Laserfiche 10:

Melissa Henley began the presentation by noting that when people attend the Laserfiche Empower conference they are welcome to stop by the “Information Center” anytime. It’s a room that has been set aside for marketing and developing Laserfiche and everyone is there just to answer questions. For example, after a class if someone has additional questions they can stop by or they could run future ideas for the use of Laserfiche by them to get their input. It’s a great resource and she encouraged everyone to check it out.

Ms. Henley reported that with Laserfiche 10, Laserfiche has created a series of webinars about “What’s New in Laserfiche 10.1”. She encouraged everyone to check out the website for additional details about them.

Ms. Henley provided an overview of the updates to the following features of Laserfiche:

- Business Process Library
- Forms
- Workflow
- Quick Fields
- Features of client, desktop and web

Business Process Library is a series of templates created for some common form based processes that can be tailored to meet each municipalities needs. Forms, template fields, folder structure, and work flow can save time for people.

Forms can be used for Human Resources related tasks – i.e. lost I.D. badges, travel authorizations, time off requests. It provides for a variety of processes so that, for many, there is no need to “recreate the wheel” so to speak. It is also a good solution for building permits. The City of Ithaca’s FOIL process is done through Forms, they conducted a Laserfiche webinar on it which has turned out to be very popular. Right now, the processes are only built out of the Forms feature, in the future they hope to be able to create additional processes through Workflow.

Ms. Henley stated that “Laserfiche Answers” is a great resource, especially for governments, to ask questions to peers using Laserfiche as well as staff from Laserfiche who can share answers and solutions with everyone. She encouraged everyone to take a look at it and remember it in the future as they run across questions that they can’t answer themselves.

She encouraged everyone to share current processes in practice now for various tasks in our offices with the staff from Laserfiche because they might be able to automate it in future.

LF Forms remove the use of paper in processes in offices. Once the form is developed the Laserfiche system maintains it for future use. The FOIL process is good use of Forms and automating a process.

In addition with Laserfiche 10 improvements have been made to teams and task management. Tasks can be assigned to a team instead of just one person which can be done through automation to automatically assign to next person in queue. Tasks can be saved in draft form to finalize later or assigned to someone else if not finished.

Mobile offline forms allows the downloading of forms to Laserfiche. You complete the form offline, and then when you have internet services, authenticate it to Business Process Management for processing. It a great tool for code inspectors in the field, or taking picture of receipts to submit later because you don’t need internet services to connect to finalize process, it can be done when there is internet available.

Laserfiche can also provide “Repeatable Reminders”, and you can schedule reminders for people who forget to approve things, it can repeat until the task is done. Reminders can be set to send daily or hourly, and are very flexible. A great way to use this is for invoices that need payment and they are waiting the approval signature, it can send repeated hourly reminders which will eventually result in 100% compliance.

There is also a Process Modeler that provides for grids and stages so that a process can be divided in to different stages. It has New Dashboard Reporting, which is new to Laserfiche 10.1 which is a great tool that can show who has the heaviest workload and which has the most tasks to be completed.

Performance dashboard will provide information on how many instances or statistics on different tasks. Such as, how long has it taken, how long each stage is taking that is out of the norm, how long in each stage it is taking, this will provide information as to where time is being spent. It's an exciting feature and is constantly being updated to meet users' needs and performance by person.

LF Workflow - Dynamic Word Document Creating Tighter Integration with Laserfiche Forms: Dynamic word document creation will create a Word document from a template, an example for clerks' would be the monthly dog license renewal letters that get sent out. The program takes tokens from the template (i.e. name, address) and puts it into a Word document to create a real letter attached to an e-mail. There is the ability for enhanced interactions with Laserfiche forms that provides for bi-directional flow between Workflow and Forms. Watermarks can automatically be applied as part of the Workflow. It can also configure and exchange out-of-office notifications once approved through Work Flow.

Quick Fields provides batch processing software that can create folder structures, and pull information from databases. It takes away the pricey part of human indexing and reduces the chance of errors. It can typically perform one or more of these roles as well: design sessions, scan documents, review documents, and configure security.

Batch scanning is great for the back-log of records that offices may have, i.e. birth and death records.

The use of Forms means that you never create the paper to begin with and gets you thinking about what you're doing to see if there are changes that might need to be made to the process to make it more efficient. It can also set certain fields to be required template by template plus set it so that not all fields in the template have to be required fields. It will provide for a preview of the document when importing and also allow copying and pasting text from image fields. You can also star entries that are files that you access regularly – similar to your “favorites” on the internet. It will let you see recently opened documents.

Questions:

Tompkins County Clerk Reynolds asked about Laserfiche's ability to fill in geo-location automatically, for example, so that it could be used for reporting pot holes. Would coordinates be entered manually or could the form automatically determine the current location of the pot hole? It would be a great tool for public works staff as they are in the field.

Ms. Henley responded that the geo-location capability is available for a while in the Laserfiche's mobile app. A picture is taken and the coordinates are already uploaded with a photo. However, geo-location is new to Forms.

Tompkins County IT Director Potter questioned whether there would be a merge of the web and client versions of Laserfiche. Ms. Henley responded that due to the many countries that Laserfiche serves, probably not for now because the client version meets their needs better.

Mr. Potter explained that right now Tompkins County's Laserfiche web version has the same functionality as the desktop client.

Mr. Potter asked about the different range of digital signatures that are now available, and the legality of them. Currently, in Tompkins County, there are documents that still require a hand original signature.

Ms. Burke responded that Tompkins County should take a look at the "Document Sign" software program that will provide certificates to people that will be signing documents to substantiate their legality.

Ms. Mistretta reported that the Oneida County Attorney's Office has done a lot of research into the legality of digital signatures. They have some heaving duty research behind that their policy which she will e-mail to Mr. Potter.

Status of Laserfiche Upgrade for Tompkins County:

Deputy County Clerk Congdon reported that the upgrade is pretty much done, and went well. She stated that the City of Ithaca had some issues on back end that are being worked on.

Ms. Mistretta stated that if anyone is still having problems with the upgrade to please let her know.

New York State Archives:

Kent Stuetz, from NYS Archives, confirmed that the bill mentioned earlier did pass at both the Senate and House levels regarding grant monies. Right now, they are waiting on Governor Cuomo to approve or veto it. He confirmed that New York State had been taking almost \$1 million or more of that money raised through various fees at County Clerk's office across New York State, slated towards records management grant funding.

General Code Training Center

Ms. Mistretta reported that everyone should have access now to the new "Training Center" for Laserfiche available on General Code's website. She stated that the website is located at www.trainingcenterforlaserfiche.com. She encouraged everyone to check it out and to let her or Deputy Clerk Congdon know if they have trouble accessing the site.

The site offers small snippets of videos on how to do things, with new content added every week. Ms. Mistretta provided a brief demonstration of the site and how to maneuver around it. The site will keep track of the courses that you've taken, and different videos will walk you through the different processes of Laserfiche.

2017 Laserfiche Empower Conference:

Ms. Henley stated that the 2017 Laserfiche Empower Conference will be held in Long Beach, California February 7-10, 2017. She encouraged everyone to attend.

General Training Needs:

Ms. Mistretta questioned whether or not everyone at today's meeting had been able to understand a lot of the information that was presented. After a brief discussion, it was determined that a plan should be made to get the local clerks some hands-on onsite training from the beginner to advanced users. That way everyone attending these meetings can be on the same page as far as learning and understanding Laserfiche. She stated that the training should start at the beginner level and go from there. She and County Clerk Reynolds will work on setting up a user group training. A suggestion was made to also include users at outside of our TSSERR group since we are not the only ones that need to know how to use Laserfiche within our local municipalities.

Local Projects:

Katy Prince, Tompkins County IT Department, stated that she would be very interested in hearing from members of our group about different forms that they use. She could probably develop them into a Laserfiche Form and possibly automate the process. She stated that, right now, Tompkins County is using Forms and automating the following tasks:

1. Bus Pass Application Form for county employees
2. Trainings - schedule, registration, person can get report of who has signed up, print it out for sign in sheet - call it up on a tablet for attendees to check off they were there - no paper or spreadsheets for sign up (I.e. For city - annual training packet)
3. Vacancy Fill Request - automatic approval process
4. Breach Incident - all on line including signatures
5. Just rolling out account access for new employees (requires employee i.d. number to use that system)
6. FOIL Process Form

Any paper form can be turned into a Form and that can then be processed completely on line. Any information contained in a field can be grabbed to do checks or look up people. For example, it can take an employee i.d. number and then automatically fill in all the associated information for that employee that may be on file.

Tompkins County Clerk Reynolds reported that Laserfiche has many videos on different processes available to watch on "You Tube". She encouraged everyone to check the videos out for answers to questions or possible solutions to current manual tasks.

Alan Karasin, City of Ithaca Department of Public Information and Technology, reported on the City of Ithaca's automated FOIL process. He stated that since the automatic process began in late 2014 over 1,600 FOIL requests have been processed with over 1,200 approved and some information given out with them. This new automated process has significantly reduced the amount of time needed to process a FOIL request, and as more information is put into Laserfiche that number will come down.

The City of Ithaca has also used Forms to assist in its Special Event permitting process. He explained the process, and noted that since it began about a year ago over 80 applications have been processed, as well as the elimination of a lot of paper that was needed to complete the application. For a vast majority of the events, using this process has meant that organizers don't need to come in for the Special Event Team meeting like they used to so it saves time for everyone.

He further reported that the City is currently looking at Laserfiche's Import Share. It's a program where different departments can put files in a particular drive, and e-mail is sent to the designated person who will then import the information into Laserfiche. This will cut down on scanning time and the current inability to e-mail large documents back and forth between departments.

The Laserfiche 10 interface is so much improved that the City of Ithaca plans to begin in-house training, and work towards automating different internal processes. The City's Human Resources Department is using Forms for hiring, transfer, title changes. The City is now looking to automate the Contract procedure that includes an RFP and all that comes in between.

City of Ithaca Clerk Holcomb reported that the City of Ithaca was informed by General Code about their new marriage license software that looks really promising that is being developed for the City of Brookfield, New York. The City of Ithaca is looking to shift most of the work currently done on its clerk's software to Laserfiche, and then have a companion software program that will take care of the revenue. She believes that by doing this that significant time and money can be saved. She also shared that the City's website now links to the minutes stored in Laserfiche so that they are available to the public at any time.

A brief discussion followed on the floor regarding whether Tompkins County might be able to automate through the use of Laserfiche the process by which the County records information from its rabies clinics held around the County. If that were done, clerks could access the information in a much easier and efficient way than currently available.

Ms. Mistretta, from General Code, stated that Oneida County already has a Laserfiche process for rabies certificates. She encouraged the Tompkins County to check with Sandy Brennan at General Code for more information on their program.

Adjournment:

Tompkins County Clerk Reynolds thanked Ms. Henley, Ms. Burke, and Ms. Mistretta for attending today's meeting and all the valuable information they were able to share with the group.

The meeting adjourned at 11:50 a.m.

Respectfully submitted,

Sarah L. Myers,
Information Management Specialist
City of Ithaca
June 28, 2016

TSSERR Sign In Date June 20, 2016

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