Ahead of the Game

Outagamie County, WI, uses Laserfiche agile ECM to improve IT services while empowering departments

Outagamie County, WI, has a tradition of innovation. Appleton, its county seat, is home to Hearthstone, the first home to be powered solely by Thomas Edison's hydroelectric technology and light bulbs, way back in 1882. Now, almost 130 years later, that innovative spirit can be seen in the county's deployment of Laserfiche agile enterprise content management (ECM) to expand and enhance information services in several departments.

A Need to Improve Data Governance—and a Need for a Plan

In 2006, county departments secured budget approval for a three-year automation planning initiative to replace the county's AS400 imaging system, which was slow and offered limited search capability. Melissa Buman, records management/administrative services supervisor for the Outagamie County MIS Department, recognized the need to manage electronic documents as intuitively as paper ones.

"The lack of an electronic records management strategy, including e-mail retention, resulted in poor data governance, with a lot of confusion and a lack of consistency throughout the departments," she says. Add to this the increasing costs of storage and managing paper files in various departments, and it was time for a change.

With the support of County Executive Robert "Toby" Paltzer, the county chose Laserfiche ECM.

Creating Repeatable Processes to Balance Departmental and IT Resources

In 2008, Laserfiche reseller Cities Digital helped the county develop an implementation strategy that would balance departmental and MIS staff resources to ensure success. Led by MIS Project Manager Steve Flater, staff reviewed existing procedures and worked out a multi-year implementation timeline before deploying Laserfiche in the Corporation Counsel, Health and Human Services, Brewster Village, Planning and Finance departments.

"Our strategy was to create a foundation with the first few departments, so the MIS team had repeatable processes to set up individual departments, while still maintaining a manageable IT workload as more departments came on board," explains Cities Digital Executive Vice President Jessica Welsch.

Organization Profile

Outagamie County, WI, is home to Hearthstone, the first U.S. residence powered solely by Thomas Edison's hydroelectric technology and light bulbs (in 1882).

Situation

In 2006, the county secured budget approval to replace its limited AS400 imaging system, while the MIS department also sought to improve electronic records management and data governance.

Solution

Laserfiche agile ECM ensures a manageable workload for the MIS department by providing repeatable processes to set up departments across the county over a multi-year implementation.

Benefits

- The Corporation Counsel's paperless incoming mail process aids in e-discovery and productivity.

- The Purchasing Department cut down time to perform audits – in one department, from 11 hours to less than four.

- Risk Management improved information security for its workers' compensation and liability claims.

- In Health and Human Services, a single-button integration with its CMS saves staff time without needing to train and support hundreds of new users.

Processes:

- AS400 migration
- Auditing
- Business Process Management
- Case management
- Content management
- Data governance
- Disaster recovery
- E-discovery
- Risk management

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The paperless (or "less paper") strategy had an immediate impact county-wide:

- Aging **Planning Department** files, for instance, could be archived, reducing storage needs and costs.

- Staff at **Brewster Village, the county-owned nursing home,** managed client case files.

- The **Corporation Counsel's** office adopted a paperless incoming mail process, reducing bottlenecks, aiding in e-discovery and improving staff efficiency and productivity.

- The **Purchasing Department** distributed requested documents more quickly. Also, says Buyer Nicole Schoultz, Laserfiche cut the audit time of the county's procurement cards in one department from 11 hours to less than four.

- **Risk Management** reduced storage demands and improved information governance. "Security and retention are big concerns because we're dealing with claims that involve confidential documents," explains Risk Administrator Brian Margan.

- **"Continuity of Operations**—which is our disaster recovery plan—is also something we look to Laserfiche to help with, so if anything happens, we can get back to business as soon as possible," Margan adds.

Laserfiche Agile ECM Improves Case Management in Health & Human Services

In the Outagamie Health & Human Services department, with 360 employees serving seven different divisions, Laserfiche has helped staff consolidate and secure patient files, which can grow to ten volumes over a lifetime of care. MIS has set up security settings that improve data governance by limiting access to documents falling under the HIPAA umbrella, redacting personal information such as Social Security Numbers. "A worker in Mental Health can't see the records of a WIC client," explains Kathy Watters, system support supervisor, adding that staff adoption of Laserfiche has been unanimous. "The folder structure wasn't hard to learn because it's what they're used to already," she adds.

A major procedural improvement has come from integrating Laserfiche with the department's case management system. "It used to be that when a contracted psychiatrist came in for the day, we had to have support staff wheel all the medical records on a big cart," Watters says. "Now, contracted staff members just click a button in the case management application to see the rest of the files stored in Laserfiche." Not only does this save staff time, it lessens the load for users and MIS staff who don't have to train and support hundreds of users.

Making an Impact in the MIS Department

The biggest impact has been in the MIS department itself, which uses Laserfiche to scan and manage its billing system records, IT requests, inventory paperwork, financial and budgeting department forms and meeting minutes. Content is never lost, and multiple staff can access and share information—even audio recordings—easily.

With the first round of deployments complete, MIS is ready to expand Laserfiche to the Airport, Highway and Coroner departments in the coming year. Plans are also underway to complete a final migration from the AS400 to Laserfiche.

The Value of Automating Repeatable Processes

Outagamie County's success illustrates the importance of setting realistic expectations and manageable goals. "We looked at this product much like we do Microsoft Exchange/Outlook—that it's IT-initiated and supported county-wide," says Pynaker.

"We learned we had to promote a team of users and IT staff to create a complete plan for the use and support of Laserfiche. We also had to look at the complete life cycle of the document to have the proper procedures implemented at the user level," he adds. "As we continue to cycle through our departments, the same basic processes will be repeated time and time again. Thankfully, Laserfiche is flexible enough to be fine-tuned based on departmental needs."

The MIS team is now looking at how Workflow can further maximize its resources. "Some of our future projects include paperless work requests and using Workflow for mail services, print shop orders, records center transfers, microfilm retrievals, and internal time off requests," says Buman.

After taking classes at the Empower 2010 Laserfiche Institute Conference earlier this month, Buman is confident but realistic. "We've come a long way, but there are still many enhancements that can be made to further automate our daily processes," she says.

About Laserfiche

A resource for more than 28,000 public- and private-sector organizations around the world since 1987, Laserfiche creates simple, elegant enterprise content management solutions that help organizations run smarter. From streamlining digital records management to automating the agenda process, Laserfiche helps improve efficiency while integrating easily within any environment.

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