

Document Management

The City recently migrated from using a legacy document management system OnBase to Laserfiche, an online Document Management System.

Background

A Document Management System (DMS) offers centralized storage, easy retrieval, and effective management of electronic documents. The City currently uses the document management system for with an extensive range of documents, including permits, licenses, legal contracts, and other records which the City is required to retain either by statute or ordinance. A DMS provides structured storage, organized categorization, and powerful search functionalities, ensuring documents are readily accessible to both the public and other

Observations:

The City's Information Technology Division, in coordination with the City Clerk, Community Development and Public Works and other Departments/Divisions have completed a significant project with the migration to Laserfiche from Onbase. Because Laserfiche is a modern, cloud-based application, new and powerful tools for document management will now be available for the City to use. For example, workflow automation, which allows documents to move through the organization automatically routing forms for approval, triggering notifications, and even updating related records without requiring manual intervention is available in Laserfiche.

Laserfiche can also automatically apply retention policies, archive documents, or trigger secure disposal according to organizational or legal requirements. This would be valuable for the City to assist in compliance with state retention laws and audit readiness.

Finally, Laserfiche also can connect with external systems such as an Enterprise Resource Planning, Online Permitting, and email to ensure that documents are automatically captured and contextually linked, a process that currently requires manual processing by the user Departments/Divisions and Information Technology.

Recommendations:

The City should consider using Laserfiche Workflow to automate document import, in particular from Online Permitting (MyGovernmentOnline) and CivicPlus/PrimeGov (the largest document generators that have specific retention policies) to improve consistency and reliability by applying standardized rules for naming, metadata, security, and folder placement. This will reduce errors commonly associated with manual imports and ensures documents are properly classified and ready for use as soon as they enter the system.

By implementing Laserfiche Workflow/Automation, the City will see reduced staff workload and Information Technology maintenance requirements, allowing more focus on downstream processes, such as review, approval, and retention.