



From mishmash to huge smash: Laserfiche® transforms Anaheim's project files

The City of Anaheim Public Utilities Department ensures that citizens have water and power on demand. But the department's antiquated filing system had made accessing important information decidedly less reliable. With over 16,000 project files, each containing a jumble of blueprints, wiring schematics, job-site Polaroids and hand-written notes, finding a particular file was often a laborious, time-consuming and ultimately fruitless pursuit.

Supervisor of Records Management Ron Smith joined the City of Anaheim in 1999 and was tasked with bringing the department's records into the digital age. Smith inherited a tangled web of misfiled information. His first day on the job, he walked into the department's records room to find 600 12- by 18-inch boxes stuffed with project files dating back to the 1800s.

Smith recalls how the hodgepodge of boxes and manila folders usually made finding a file a shot in the dark. "It was the black hole syndrome," he says. "I'd pull these boxes out for the engineers and we couldn't always find stuff for them. Our level of service was suffering horribly."

The engineers were equally frustrated, given that they'd often have to go rummaging through those boxes with the record keepers before they could get started on the day's workload. "We had all kinds of different files," says Mahendra Garg, the principal engineer with the Anaheim electric utility. "They were all over the place."

The records were mostly archived by project number, Smith says. Over the years, staffers would sometimes assign an old number to a new project, resulting in multiple files with the same project number. Finding records was a time-consuming process that often led down blind alleys when the wrong project was found under the right project number.

Smith knew he had to implement digital document management to begin his mission of modernization. Laserfiche was already in use in other city departments, which certainly helped with getting approval. In addition to its familiarity, Laserfiche could handle the myriad media that comprise each public utilities project.

"We needed to partner with the perfect company and we did with Laserfiche," Smith says. "They had people who would sit down and work with us. When we found this system, we knew we had made a good choice."

Organization profile

The City of Anaheim is the tenth-largest city in California. Founded in 1857 by fifty German families, Anaheim is famed for its theme parks, champion sports teams and convention center.

Situation

The city's project files were a hodgepodge of blueprints, photographs and diagrams, making it difficult to find mission-critical information. City staff wanted to improve their quality of service by organizing and enabling fast access to over 150 years' worth of project files.

Solution

Anaheim implemented a Laserfiche document management system and immediately began digitizing over 16,000 project files. Staff now have immediate access to documents from their desktops, and plans are underway to automate the process of updating project files.

Benefits

- Powerful search and retrieval capabilities enable fast document access, saving staff time.
- Documents are labeled and indexed by template fields, so staff can search for them in a number of different ways.
- Records are preserved for future employees to maintain continuity.

Laserfiche Components:

WebLink™
Quick Fields™
Records Management Edition™
Workflow™
Plus™

After sorting all of the department's documents—from memos and work orders to maps and photos—into distinct groups, staff began scanning the items into the Laserfiche repository, electronically labeling each file by street name, job number and type of utility. Now, the city's utility workers and civil engineers can quickly locate records using whatever information they have on hand, and then access those records directly from their desktops.

The engineers definitely appreciate the newfound convenience. "From what I've seen so far, it's great," says David Butera, an engineer in the water utility's capital projects division. "Now, if we need to find something, we can just look it up on our computers. Or, if we want to copy something, we can just send it to the closest printer—we don't have to go walking across the building."

Besides providing immediate information access, Laserfiche has brought a number of additional benefits. Every public utilities project generates a common sub-set of records, such as construction drawings and work orders, that are key to supporting everyday business processes. Currently, staff scan these documents into Laserfiche individually, then route them to their appropriate destinations. Soon, they'll use Quick Fields™ to process these common documents in batches, saving even more time.

Smith also reports that Laserfiche Records Management Edition™ (RME) greatly simplifies the management of retention cycles by automatically assigning the same retention period to all subfolders within a given parent folder. "This makes demonstrating compliance much easier, because we can show where all records are stored and maintained, and what their retention period is," he says. "It ensures accountability to regulatory agencies, rate payers and, most importantly, to our staff members and city officials."

RME has also become the centerpiece of an enterprise-wide records management platform, currently in the testing stage. Using Workflow™ and Import Agent™, the system will automatically route completed construction drawings, providing staff with accurate, real-time updates to critical information. Smith envisions a not-too-distant future in which the details on every public utilities project, from the turn of a screw to a new baseball stadium, will be instantly and securely stored in Laserfiche.

The public utilities department has come a long way in the years since installing Laserfiche, and Smith plans to build on that success. In addition to the RME installation, he has plans to integrate Laserfiche with the city's GIS system, which updates the city's new Outage Management System. Smith says this will solve a major issue with routing finalized construction plans. "We need to import these documents into our GIS system in their native file format, and we can do that with Laserfiche," he says. "The integration will significantly improve our business processes, as well as solve the long-standing problem of having real-time updates to our systems that depend on having electronic maps routed immediately upon completion."

Given the department's success with Laserfiche so far, it's a good bet that this and other improvements will have a major positive impact on the quality of service Smith and his colleagues provide. In addition, Smith hopes that the spirit of innovation he's helped instill will carry on to Anaheim's future engineers and records managers. "We want to leave a legacy of improvement for future employees," he says. "There are all kinds of theoreticals in working with records. But in the end, you have to be able to manage them."

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Ron Smith
Records Manager

About Laserfiche

A resource for over 23,000 public- and private-sector organizations around the world since 1987, Laserfiche creates simple, elegant document management solutions that help organizations run smarter. From streamlining digital records management to automating the agenda process, Laserfiche helps improve efficiency while integrating seamlessly within any environment.

Your Next Step

Visit laserfiche.com/gov to get a free white paper on implementing an electronic document management system. Or call (800) 985-8533 to get answers now.

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