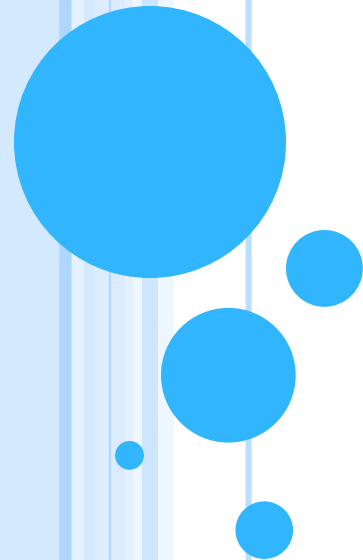


# CITY OF FAIRFAX

Cynthia Stimson  
City Clerk/Treasurer

Paper Reduction  
April 2015



# WHY?

- Our council packets were huge, took a long time to build, and used a ton of paper
- In February of 2011 we starting using GL, PR, BK, AP as well as UB modules on Summit
- The journals from this software used a ton of paper each month
- We have very limited storage space and didn't like spending so much on paper that got placed in a box and held on to for years



# DIGITAL DOCUMENT MANAGEMENT

- Reduces lost and misfiled documents
- Provides faster search and retrieval of documents
- Better organizes existing documents
- Improves general work processes and organizational efficiency
- Reduces the amount of physical space used to store documents (cabinets, boxes, and shelving)
- Improves safety of information because the information is backed up in more than one location
- Allows different levels of security to be placed on sensitive information and to give staff different authorities
- Allows web/mobile access to documents for staff, elected officials, and the public as determined needed

*Some of this information is from: [The Ultimate Guide to Records Management by Laserfiche](#)*



# CITY COUNCIL TABLETS – JANUARY 2012

- Purchased 6 Acer tablets for City Council use - each with a stylus and cover
- Set up two wireless networks at city hall, one for staff - one for the public
- Purchased a laptop
- Made these equipment purchases through Network Computer Solutions of Eastern Iowa in Marion and had them set-up everything
- No data plan for tablets
- Council downloads documents from wireless connections at home, work/business, or city hall
- First totally electronic packets were in April 2012
- Cost: \$4,628



# GIS SYSTEM – FALL 2012

- Purchased geographic information system (GIS) in 2012
- Midland GIS Solutions, Maryville, MO provided the software, web hosting, and performed data gathering and data set-up
- Cost: \$42,752 initially, now \$3,600 annually for web hosting the data
- This gives us mapping information in electronic format and allows us to print maps
- We have data layers for water, sewer, storm water system, trees, and Linn County information with streets, addresses and lot lines
- We can add more layers as needed, add lines, enter maintenance information, etc..



# CITY COUNCIL iPADS – JANUARY 2014

- Purchased 6 iPads from Staples
- Purchased keyboards/covers from Best Buy
- Placed pdf reader app on each iPad
- No data plan for iPads
- Council downloads documents from wireless connections at home, work/business, or city hall
- Cost: \$3,212



# PLANNING & ZONING GET TABLETS

- Once the iPads were operational we distributed the tablets to the P&Z members
- Purchased one more Acer tablet, because the P&Z has seven members
- We purchased this through Network Computer Solutions in Marion
- Cost: \$360



# ELECTRONIC PACKETS

- Once the tablets were ready to use, we started making our City Council packets and then later also the P&Z packets electronic
- Receive or convert all documents to pdf files
- Place these pdf files in one computer folder and rename them so they are in agenda order
- Use CutePDF Professional software (\$50 one-time fee) to combine those pdf files into one large pdf document and to add bookmarks, etc.
- Initially we placed these packets on our website for download

<http://www.cutepdf.com/products/cutepdf/pro.asp>





# ELECTRONIC PACKET CHANGES

- The packets got to be too large to upload to our website
- We now place them on Google Drive – this is free and easy to use
- Place the link to the packet on our website and email the link to City Council and staff
- Also use Google Drive and Google Documents for documents for our utility billing, mapping, and more



<https://drive.google.com>



# MEETING NIGHT

- City Council bring their iPads
- P&Z bring their tablets
- Laptop is connected to a large screen TV on the wall to display packet documents - clerk runs the TV display
- We often bring up Google Earth to view areas being discussed
- Members are able to make notes on the packet they have downloaded for discussion or reference later
- Most of the time they follow along on the TV



# OTHER EQUIPMENT – CITY HALL DESKS

- Monitors at desks – we have three monitors at the clerk and deputy clerk’s desks
- These are wonderful!
- Cost: \$320 for second two
- Cost: \$814 for third ones plus computer upgrades
- Our video cards needed to be upgraded to handle three monitors
- These help us do our tasks and stay as paperless as possible



# MAINTENANCE DEPARTMENT TABLETS

- Purchased 3 Galaxy Note 10 tablets from US Cellular in May of 2013
- At the time they had a great rebate program
- Net cost was \$175 for each tablet
- Purchased screen protectors, covers, and truck mounts for about \$140 each
- Data Plan is a shared plan for \$25.00 a month per device through US Cellular
- Used for email, camera, site sheets, GIS program, other mapping, and more
- Total initial cost \$945.00, with \$900.00 annually



# FIRE DEPARTMENT TABLETS

- Purchased 9 Galaxy Note 10 tablets from US Cellular in May of 2013
- At the time they had a great rebate program
- Net cost was \$175 for each tablet
- Purchased screen protectors, covers, and truck mounts for about \$140 each
- Data Plan is a shared plan for \$25.00 a month per device
- One in each fire department vehicle and one for the fire chief
- Use them for Iam Responding, mapping, camera, reporting, downloaded information about topics such as hazmat and extraction, and more
- Total initial cost \$2,835.00, with \$2,700.00 annually



# RESCUE PICTURES



# SOFTWARE CHANGES

- April of 2013 started using Laserfiche
- This is a document management software which is used worldwide and integrates well with other software packages – all documents are OCR'ed
- We purchased this from Advanced Systems, Inc. in Waterloo
- Cost: \$14,028 for the software with the first year's support fee, a large batch scanner, and labor to set up templates and batches
- We print all accounting journals and reports directly to Laserfiche
- We scan all payment stubs, deposit slips, order sheets, invoices, checks, timecards, and more into Laserfiche
- Documents are linked together for easy reference
- In October 2014 we started auto linking invoices to the checks when the checks are printed



# EXAMPLES OF USE

- Mayor needed to find a topic in the minutes from decades ago – it was just a quick search in Laserfiche to find exactly what he needed.
- For an insurance claim we needed to find details of our crop sale from the previous year – again it was just a quick search in Laserfiche. We found the GL journal, with the deposit slip and crop sale detail documents attached. We printed them for the adjuster. We can print to CutePDF Professional and email them just as easily.
- The fire department needed to see specifics about three different invoices from a vendor – again it was a quick search in Laserfiche. We found the checks issued and the invoices were attached.





# LASERFICHE FOLDER STRUCTURE

- City of Fairfax
  - Deposit Slips
  - Invoices
    - 2014
    - 2015
      - 01 January
      - 02 February
      - 03 March
  - Journals
    - Accounts Payable
    - Bank Rec
    - Payroll
    - Utility Billing
      - 2014
      - 2015
        - 01 January
        - 02 February
        - 03 March



# INVOICE FOLDER EXAMPLE

<b>VENDOR NAME</b>	<b>Meeting</b>	<b>Last Modified</b>
○ Absolute Security-Invoice	3-10-15	02-26-15
○ Absolute Security-Quote	2-10-15	01-21-15
○ Advanced Systems-Invoice	3-10-15	02-19-15
○ Baker Paper-Statement	3-10-15	02-26-15
○ Fauser Energy-Invoice	3-10-15	02-27-15
○ Fauser Energy-Tickets	3-10-15	02-25-15
○ IAMU-Registration Form	3-10-15	03-02-15
○ Menard's-Register Tapes	3-10-15	02-18-15
○ Menard's-Invoice	3-10-15	02-23-15
○ Staples-Order Sheet	3-10-15	02-19-15
○ Staples-Packing Slips	3-10-15	02-20-15
○ Staples-Invoice	3-10-15	02-23-15
○ Stimson, C-Reimbursement Form	3-10-15	03-04-15



# OLD DOCUMENTS

- We hired a part-time employee to work at city hall from July of 2013 to May of 2014 to scan old documents
- Cost: \$7,500 – you may be able to avoid this cost by using an intern or volunteer
- Five years of journals, reports, and payment stubs have been scanned, placed in Laserfiche, and shredded
- All non-computer minutes have been scanned and placed in Laserfiche – we did not shred these
- These documents are now searchable, organized, and safe – we back up each night to our server and to the cloud

**Laserfiche®**

[www.laserfiche.com](http://www.laserfiche.com)



# FUTURE PLANS - SCANNING

- We continue to think of new ways to use Laserfiche
- Building department records – this will be our next large project
- Employee files – we will scan these soon and set security levels for viewing documents
- Other old records – payroll records, reports, correspondence, project documents, building plans, etc....
- Fire Department documents – HIPPA secure, protocols accessible on their tablets, and more
- Everywhere I look there are records that could be scanned to make them more useable, safe, and save space



# FUTURE PLANS – ICOMPASS SOFTWARE

- Purchased iCompass Meeting Manager Pro Software
- Cost: \$5,600
- Implementing now and we will start to use by June 2015
- Some of the features:
  - Integrates with Laserfiche
  - Drag and Drop Agenda Builder
  - One Click Publishing
  - Automated Email Notifications
  - Automated Minutes Manager
  - Automated Motion Sheets
  - Automated Meeting Follow-ups Report



# FUTURE PLANS - ICOMPASS SOFTWARE

## ○ Features Continued:

- Agenda and Minutes Approval Routing
- Automated Facebook and Twitter Updates
- Optional Audio/Video streaming
- Staff Report Builder
- Reports Approval and Workflow Engine
- Meeting Decisions Dashboard
- Staff Reports Dashboard
- Agenda Annotation/Notes
- Website Integration – Web Portal
- Unlimited Users
- And More!

[www.icompasstech.com](http://www.icompasstech.com)



# FUTURE PLANS – LASERFICHE FORMS

- Approved to purchase Laserfiche Forms, Forms Portal, and Web Access modules as of July 1
- Software and labor cost: \$10,010
- Total annual support fee cost will now be: \$3,004
- Can build forms with a business process in them, which means when filled out and sent certain things automatically happen with the form
- Place forms on our website so public or staff can fill them out and start a process
- Access our Laserfiche repository anywhere based on authority level given



# EXAMPLES OF USES OF FORMS

- Fairfax Youth Sports Association has asked for the first forms we generate – they want an online form that people can fill out to work the concession stand (actions example: fill out form, send email to FYSA, place information on table, edit dates and times when filled, and send a reminder email to worker four days before they are to work)
- We will have their soccer registration forms fillable online soon (this will have actions also)
- The clerk's office first form will be our park reservation process
- We will have our building permit forms revised and fillable online within the next year
- Move In/Out Form, Snowbird Form, Complaint Form, and the list goes on and on....





# SIGNATURE AUTOMATION

- I recently listened to a webinar sponsored by American City & County about signature automation
- This is an e-trend for governmental agencies
- Using signature automation eliminates the need to print the document you have electronic only for a physical signature
- Electronic signatures are legal by federal and state law
- We are still looking into this option and hope to implement this during the next year



# ARMA INTERNATIONAL

- I have just joined ARMA International
- Established in 1955, this is a not-for-profit professional association for records and information professionals
- They help develop information standards and law
- They offer standards guidelines, best practices, trends, webinars, books, *Information Management* magazine, professional networking, and more
- [www.arma.org](http://www.arma.org) is their website
- Membership was \$149 for this first year



# REMEMBER

- The paper reduction processes we have put in place are to help us, not hinder us
- If it doesn't make sense to convert a process, we don't
- If we need to view something on paper, we print it – some things are just easier to read on paper
- This is a change that takes a long time to put into full use, but you have to start at some point to begin the change process
- Pick a process and starting point - then work from that point, both forwards and backwards if needed



# CONTACT INFORMATION

Cynthia Stimson, City Clerk/Treasurer

City of Fairfax

[fairfax@southslope.net](mailto:fairfax@southslope.net)

319-846-2204

[www.cityoffairfax.org](http://www.cityoffairfax.org)

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Network Computer Solutions of Eastern Iowa, Inc.

Phil Hedtke

[phedtck@ncsei.com](mailto:phedtck@ncsei.com)

319-247-7223

[www.ncsei.com](http://www.ncsei.com)



# CONTACT INFORMATION

Advanced Systems, Inc.

Mark Rice

[Mrice@asiowa.com](mailto:Mrice@asiowa.com)

319-415-9252

[www.asiowa.com](http://www.asiowa.com)

[www.laserfiche.com](http://www.laserfiche.com)

iCompass Technologies

Leon Rogers

[lrogers@icompasstech.com](mailto:lrogers@icompasstech.com)

360-778-9498

[www.icompasstech.com](http://www.icompasstech.com)

