

Solar Empowered

The City of Sun Prairie shines a light on business practices

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The City of Sun Prairie, WI, is the fastest growing city in Wisconsin with 26,000 residents and counting. But serving this rapidly expanding community has meant its municipal offices are spread out between its City Hall and satellite facilities that house various departments, its wastewater treatment and even a public access cable station. The main fire and EMS stations are housed in yet a third location.

So when City Clerk Diane Hermann-Brown says staying on top of Sun Prairie's mounting paperwork was a city-wide problem, she literally means city-wide. "With all of our various departments that are off-site, it wasn't just an issue of the time involved to retrieve the documents, but the time and resources involved in sending a clear, clean copy to the requesting party," she says. "From the start our vision was to have a records management system where people could search, retrieve and print their own copies without ever leaving their work station."

Records Management Benefits

"Our Laserfiche Records Management System has served as a tool that benefits all departments and residents of the City," says Sun Prairie, WI, City Clerk Diane Hermann-Brown. "We did not fully realize how much we could do right from our desks. **You could literally run a country from a single office with Laserfiche.**"

She says because of Laserfiche the City of Sun Prairie has been able to:

- **Serve as a catalyst for expanding technology.**
"Laserfiche has served as a building block for office technology by first starting with Records Management and Agenda Manager that we can add on to with a Minute Manager system, GIS Integration, Workflow Management, and other software program options."
- **Hire more staff while making existing staff more efficient.**
"Laserfiche can eliminate unneeded staff positions, but for us, it's actually enabled us to keep hiring more people to keep up with our City's growth. The cost savings helped, as did opening up additional work space after the filing cabinets were gone. People are more focused on their specific job responsibilities rather than menial document tasks."
- **Get paid faster.**
"Laserfiche aids in the more swift collection of revenues, due to more efficient recordkeeping."

Hermann-Brown was inspired by a trip to an International Institute of Municipal Clerks conference—"that triggered the spark," she says—to start investigating digital records management systems. After three years of requests, funding was approved in 2005. In early 2006, Laserfiche was chosen after reseller Cities Digital, Inc., outlined a three-phase implementation that first addressed simple search and retrieval needs.

The immediate goal, says Cities Digital's Jessica Welsch, was to get the City Clerk's, City Administrator's and City Attorney's offices, as well as the Planning and Finance departments, up and running with Laserfiche. At the same time, Cities Digital worked with city staff to implement best practices and efficiency-building techniques into their Laserfiche use. "We knew we were asking people to let go of their paper and work a little differently than they were used to," says Welsch. "It's easy for us to tell them their jobs were going to get easier, but we wanted to make sure we weren't creating any new work for them by asking them to learn the software."

From Hermann-Brown's vantage point, the city's new Laserfiche system had to meet three main goals:

1. Automate document management while maintaining a system of records management.
2. Meet compliance requirements regarding retention schedules with state auditors and regulators.
3. Scale to meet both the city's growing number of users and extended uses of Laserfiche's capabilities.

The first point presented an initial challenge: How to standardize the file folder structure and naming convention that would satisfy all the records requests that would come in through the Clerk's Office? Hermann-Brown spent a lot of time meeting with department heads, then talking to staff that would be using the system. Next, a test group of users reviewed the various naming conventions that were used by the departments. "We had a lot of boxes," Hermann-Brown laughs.

A consensus was going to be hard to come by, so Hermann-Brown says she put her foot down and a small group of Department Heads made the final decision on the naming conventions. The naming conventions would not only standardize records, but word processing documents as well, which, with so many different departments used to doing things their own way for so long, created resistance. "Sometimes you have to just make a decision which is in the best interest of all departments," she says. "People had to change, but it wound up making things easier for them. Now that they're using it, they see how it makes sense, because they can find things on their own—they don't have to call up people in other departments when they're searching for documents. In the end, it saves them a lot of time." Establishing central control went a long way to enabling more productive departmental flexibility, she adds.

This was especially beneficial to the Finance Department. In fact, owing to the range of documents the department scanned (receipts, bills, check stubs), the standardized naming convention and document types enabled the advanced capture capabilities of Quick Fields to automate much of the hand-keying and filing that staff used to labor over. Now, finance staff prints all of its reports from its General Ledger to Laserfiche and scans all of their Accounts Payable documents, while staff from other departments can retrieve their own past invoices, payment checks and other documents, instead of requesting them from Finance staff.

Just in the Finance Department alone, six three-drawer filing cabinets were sent packing, which freed up office space for additional personnel, which the department was able to hire, thanks to the savings from more efficient use of work hours. Now, finance staff can access vendor invoices immediately. It's a vast improvement over a process that used to involve manual retrieval of records kept in a dark, disorganized basement.

City Auditors likewise have seen the added value of immediate and searchable access to documents and supporting paperwork. Auditors had to be sure the new software would integrate securely with their growing applications (they are currently in the middle of a MUNIS deployment). "Before any implementation of software in the Finance Department, we had to get it approved by our Auditors," explains Jan Thomas, Deputy City Treasurer. Cities Digital had extensive experience with successful Laserfiche integrations, and after deployment, a backlog conversion added Accounts Payable and Accounts Receivables documents, banking statements, and financial records dating back to 2005 into Laserfiche.

The City's 2007 audit was the first to use Laserfiche. "Oh did the auditors love it! Because we'd been scanning in our information from day one, we were able to audit our AP, AR, banking statements and financial records right from Laserfiche," says Thomas.

The second phase of the city-wide deployment was to implement Agenda Manager in the Clerk's, Planning and Finance departments to automate and simplify the multi-departmental, often multi-headache-inducing management of weekly and monthly meetings. Welsch and her Cities Digital team worked with the City to create role-based training documents that made it easy to get users performing their functions in Agenda Manager's powerful interdepartmental workflow and agenda preparation and publishing tools.

"Agendas are very time-consuming, especially when you have four levels of approval like we do," Hermann-Brown says. "We have 'Agenda Fridays' and we used to have to try to track people down on Friday afternoon to approve items and make changes. Now an administrator can be in a meeting, get an e-mail notification and send comments via e-mail to the individual preparing the agenda. Especially in a municipality our size, with so many layers of approval, it really saves a lot of time and effort not having to walk these big packets of paper around trying to find people."

Hermann-Brown had a chance to preview the upcoming release of Agenda Manager 8 at this year's IIMC conference. "It's more user friendly and has more helpful features and processing options, which will make it a lot more advantageous and efficient for our users," she says, referring to, among other new features, Agenda Manager 8's

new in-place document editing and enhanced notification capabilities. “It’s good to see that Laserfiche is still evolving Agenda Manager to meet the changing job and changing job requirements of our users.”

Hermann-Brown is cautious but optimistic about the coming year. “How are we going to respond to the needs of staff and public when it’s hard to convince the city council to spend money on technology when budget funding will be very challenging—even when what’s needed to improve service might cost the taxpayers some money?” she asks. “Residents have higher expectations for a responsive government than they did 10 years ago, but they also do not want to see spending increased.”

With Laserfiche, she feels her local government is responding to the residents needs efficiently, as well as being financially accountable. And thanks to Laserfiche, everyone’s needs are being met.

Sun Prairie Project Implementation Timeline

2005

- After three years of requests, funding is approved to purchase a digital records management application.

2006

- Laserfiche is selected and purchased, and plans begin for implementation.
- Internal group creates naming standards for documents/folders and “Best Practice” policy for records management.
- **Phase 1 begins:** Laserfiche implemented in the City Clerk’s, Finance, City Manager’s and City Attorney’s offices.

2007

- Agenda Manager implemented.
- Additional user licensing, Workflow automation, document archiving and distribution are added to the city’s Laserfiche system.
- HR Department begins scanning in personnel records.

2008-2009

- **Phase 2 begins:** Integration with the City’s Geographic Information System (GIS) application.

2009-10

- **Phase 3 begins:** GIS Integration and WebLink public portal implementation will push Laserfiche out to police in the field and will enable public access for document requests.