

Enterprise Document Management Strategy

Heads of Information Systems Annual Conference 2017

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Context

- Local Government Reform
- Workforce Planning
- Staff Embargo



Housing Section – Ongoing Issues

- Sub-optimal use of iHouse Housing Mgt System
- Multiple parallel systems
- Information Silos
- Lack of standardised processes
- Physical storage challenges
- Lack of integration between systems

Solution for Housing Unit



Streamline

Digitize

Automate

Housing Project Challenges

- Customers (Housing Applicants, Tenants & Grant Applicants)
- Hybrid physical and electronic filing – search and retrieval issues
- Manual movement of paper around the Council and to third parties (i.e. Occupational Therapists, Gov. Depts)
- Information loss – governance and service issues
- Customer service response times – service and KPI issues
- Change Management

Housing Project Objectives

- Reduce no. of paper based processes
- Reduce headcount for administration and operations
- Increase use of automated solutions for document approval
- Drive increases in operational and process efficiencies
- Improve customer service and response times
- Integrate Housing and Finance Applications

Electronic Document and Records Management System (EDRMS) Tender Process

- Issued RFT on etenders (March 2014)
- Shortlisted for solution demos
- Set up Project Team (Project Sponsor – Business Lead, I.S. Lead, Users)
- Laserfiche demo from Bizquip – impressive out-of-box functionality, extensive client base in U.S.
- Bizquip awarded contract (June 2014)

EDRMS Implementation

Server Infrastructure

- IIS Web Application Server in DMZ
- Application Server(s)
- Database Server (MS SQL Server)
- Test Server

Client Infrastructure

- PC (Windows 7, 10)
- Tablets(Android, Apple iOS)
- Smart Phones (android, iOS)

EDRMS Implementation

- Back scan
- Ongoing document scanning & shredding
- Design folder / filing structure & access control
- Design metadata
- Design workflows
- Design forms
- Implement systems integrations

EDRMS Implementation

- Back scan & import to repository
- Document scanning & shredding going forward
- Design folder / filing structure & access control
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Folder / Filing Structure

Properties - Laserfiche

File Edit View Tasks Tools Records Window Help

Location: MonLFLive\Housing\Housing Stock\Properties

| Folders | Name | Creation Date | Last Modified | Template Name |
|--|---|------------------|------------------|----------------------------|
| Laserfiche Repositories | 1 98 Avenue, Clones | 12/02/2015 14:59 | 06/10/2017 09:40 | Housing - Property Folders |
| MonLFLive | 1 Aibhinne an Chaislean, Newbliss | 12/02/2015 14:59 | 06/04/2017 12:47 | Housing - Property Folders |
| Corporate | 1 An Clos, Bawn | 12/02/2015 14:59 | 05/10/2017 10:43 | Housing - Property Folders |
| Councillors | 1 An Cluain, Bawn | 12/02/2015 14:59 | 04/10/2017 12:14 | Housing - Property Folders |
| Finance | 1 An Gleann, Cloughvalley, Carrickmacross | 12/02/2015 14:59 | 09/03/2017 11:58 | Housing - Property Folders |
| Housing | 1 An tUachtarlann, Millbrook, Clones | 12/02/2015 14:59 | 06/10/2017 15:10 | Housing - Property Folders |
| Budgets Finance Circulars & Ceilings etc | 1 Ard an Chlochar, Roslea Road, Clones | 12/02/2015 14:59 | 06/04/2017 12:35 | Housing - Property Folders |
| Estate Management | 1 Ard Glas, Killygoan, Monaghan | 12/02/2015 14:59 | 07/03/2017 14:39 | Housing - Property Folders |
| Grants | 1 Bothar Barr Na Gaoithe, Convent Lands, Carrickmacross | 12/02/2015 14:59 | 06/10/2017 15:11 | Housing - Property Folders |
| HAP | 1 Bothar Cnoc Na Gaoithe, Convent Lands, Carrickmacross | 12/02/2015 14:59 | 06/10/2017 15:13 | Housing - Property Folders |
| Housing Stock | 1 Bothar Mhuineachain, Rockcorry | 12/02/2015 14:59 | 06/04/2017 12:47 | Housing - Property Folders |
| Estates | 1 Carn Heights, Clones | 12/02/2015 14:59 | 09/11/2016 16:12 | Housing - Property Folders |
| Properties | 1 Ceide Mhic Chlamha, Clones | 12/02/2015 14:59 | 09/03/2017 11:58 | Housing - Property Folders |
| SOLD Housing Stock | 1 Church Ave, Ballybay | 12/02/2015 14:59 | 06/04/2017 12:31 | Housing - Property Folders |
| Inbox | 1 Clairemount Rise, Rockcorry | 13/03/2017 14:13 | 27/09/2017 16:02 | Housing - Property Folders |
| Loans | 1 Clonkeencole, Clones | 12/02/2015 14:59 | 29/08/2017 11:55 | Housing - Property Folders |
| Management Training Meetings | 1 Cluain Lorcain, Latlorcan, Monaghan | 12/02/2015 14:59 | 06/04/2017 09:58 | Housing - Property Folders |
| RAS | 1 Cois Abhainn, Threemilehouse | 12/02/2015 14:59 | 06/04/2017 12:47 | Housing - Property Folders |
| Social Housing Investment Program | 1 Cois Carraig, Doohamlet, Castleblayney | 12/02/2015 14:59 | 06/04/2017 12:47 | Housing - Property Folders |
| Social Work | 1 Cois Cill, Doohamlet, Castleblayney | 12/02/2015 14:59 | 06/04/2017 12:47 | Housing - Property Folders |
| SSWP | 1 Cois Cill, Oram, Castleblayney | 12/02/2015 14:59 | 01/06/2017 17:33 | Housing - Property Folders |
| Z Workflows & Processes | 1 Cois Darach, Newbliss | 12/02/2015 14:59 | 06/04/2017 12:47 | Housing - Property Folders |
| Human Resource Management | 1 Cois Locha, Emyvale | 12/02/2015 14:59 | 06/04/2017 12:45 | Housing - Property Folders |
| Information Systems | 1 Cortolvin Villa, Monaghan | 12/02/2015 14:59 | 01/09/2017 12:33 | Housing - Property Folders |
| Internal Audit | 1 Crann Mór, Rockcorry | 12/02/2015 14:59 | 09/08/2017 13:08 | Housing - Property Folders |
| LFForms | 1 Crommhaol, McCurtain Street, Clones | 04/01/2016 11:46 | 06/10/2017 15:34 | Housing - Property Folders |
| MDBallybayClones | 1 Cuir Droim Ard, Carrickmacross | 12/02/2015 14:59 | 06/04/2017 12:46 | Housing - Property Folders |
| MDCarrickmacrossCastleblayney | 1 Cuir Ui Mheith, Emyvale | 12/02/2015 14:59 | 06/04/2017 12:45 | Housing - Property Folders |
| MDMonaghan | 1 Cul Brannan, Ballybay | 12/02/2015 14:59 | 06/04/2017 12:46 | Housing - Property Folders |
| Roads | 1 Deery Tce, Inniskeen | 12/02/2015 14:59 | 23/11/2016 12:40 | Housing - Property Folders |
| Recycle Bin | 1 Devin Reilly Terrace, Monaghan | 12/02/2015 14:59 | 18/03/2015 16:39 | Housing - Property Folders |
| | 1 Doon Ard, Inniskeen | 12/02/2015 14:59 | 06/10/2017 15:36 | Housing - Property Folders |
| | 1 Drummond-Etra, Carrickmacross | 12/02/2015 14:59 | 21/08/2017 16:29 | Housing - Property Folders |
| | 1 Elmbrook, Castleblayney | 12/02/2015 14:59 | 01/09/2017 12:21 | Housing - Property Folders |

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Metadata

Tenant Documents Properties

General **Dynamic Fields**

Name:

Description:

| Field Name | Type | Width | Default Value | Multiple | Required | Required for This Template | Indexed | Field I |
|-----------------------|------|-------|---------------|--------------------------|-------------------------------------|----------------------------|--------------------------|---------|
| Estates Document Type | List | 40 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Defau |
| Surname | Text | 50 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Defau |
| First Name | Text | 50 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Defau |
| Address - Tenant | Text | 150 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Defau |
| AGRESSO Customer ID | Text | 40 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Defau |

Color:

List Field:

Constraints:

Field Format:

Default Value:

Field:

Reorder Rows:

Field Count:

Security Preview

Preview Template

Template: Tenant Documents

Estates Document Type (required)

Surname

First Name

Address - Tenant

AGRESSO Customer ID (required)

Close

Preview Template

Template: Tenant Documents

Estates Document Type (required)
Tenancy Agreement

Surname
Blogg

First Name
Joe

Address - Tenant
1 Main Street, Monaghan

AGRESSO Customer ID (required)
123456

Close

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Toolbox

Search the activities

Frequently Used

Activities are automatically added to this category when they are used.

Routing Activities

Laserfiche Actions

Laserfiche Metadata

Flow Control

Conditional Decision

Conditional Parallel

Conditional Sequence

Deadline

Delay

End Workflow

Escalation

Parallel

Rethrow

Routing Decision

Sequence

Try-Catch

Wait for Entry Change

Repeating

Information Gathering

Token Creators

Enterprise Integration

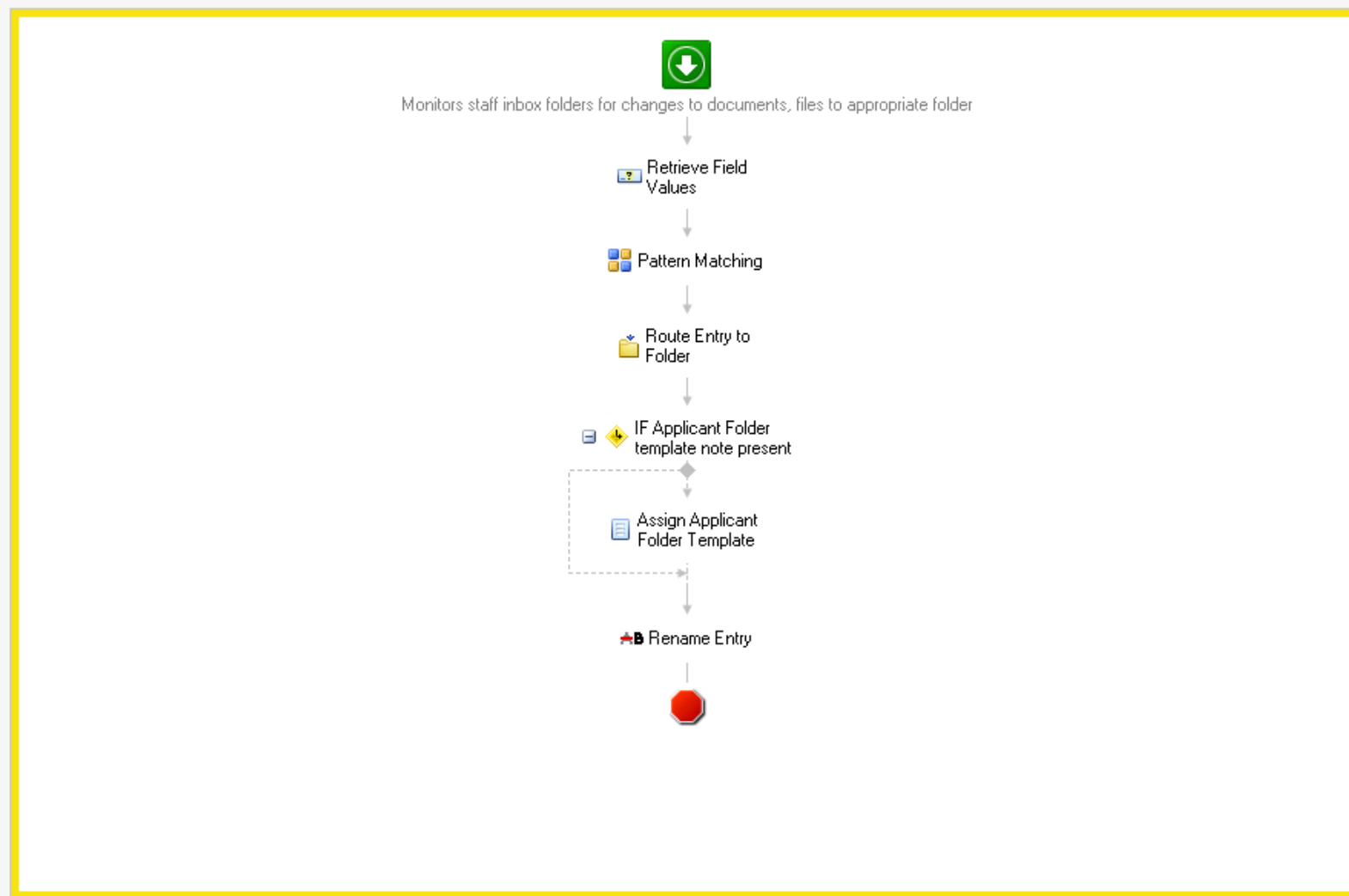
Ready

Rule Manager

Estates Inbox Management

Estates Inbox Management - Applicants

Housing Estate Document Filing



Properties

Estates Inbox Manage...

Workflow Name

Estates Inbox Management - Applicants

Workflow Description

Monitors staff inbox folders for changes to documents, files to appropriate folder

Connection Profiles

MonLFLive: Workflow@MonLFLive

[Manage workflow connection profiles...](#)

Business Process Options

 Make this workflow a business process

Allow Laserfiche client applications to:

 Start this business process

 Display this business process's information

when they are connected to:

MonLFLive (on monlf1.monaghancoco.lgov)

[More Options...](#)

Input/Output Parameters

Input Parameters:
(None)

Workflow Server: monlf2

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Repair Assign Request



- Layout
- Field Rules
- Lookup Rules
- Themes
- CSS and JavaScript

- Fields
- Variables

- Single Line
- Multi-line
- Radio Button
- Checkbox
- Drop-down
- File Upload

- Address
- Number
- Email
- Date
- Currency
- Signature
- Geolocation

Custom HTML

Section

Repair Form

Form to detail repairs required

Date Repair Request Issued: today

Property Address *

Townland

District

iHOUSE Property ID

AGRESSO Property ID

Request Details

Repairs Requested *

Planned Maintenance * Yes No



Repair Form

Form to detail repairs required

Date Repair Request Issued

08/10/2017 

Property Address *

1 98 Avenue, Clones

Townland

Largy

District

Ballybay-Clones

Request Details

Repairs Requested *

Roof Leaking

Planned Maintenance *

Yes No

Access to Dwelling

First Name - Tenant

Carmel

Surname - Tenant

O'Hare


Phone - Tenant

087 123456

Contact Details for Access

Key with neighbour

Job Assigned to *

Carmel O'Hare 

Assign Repair Request

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System Integration

- Data imported to Laserfiche for metadata selection
e.g. Applicant and Tenant data from iHouse
- Screen-level integration
i.e. iHouse with Laserfiche EDRMS and Agresso FMS

Housing Project Outcomes

Estates Management

- Instantaneous access to all documentation via housing application
- Enhanced customer service through elimination of information loss and improvement in response time
- Automated processes create electronic filing structures for new housing applications
- Generation and acceptance of third party O.T and EHO reports fully digitised

Housing Project Outcomes

Property Management

- Utilising mobile deployments, engineers and craftworkers can submit repair requests, property inspections and SSWPs remotely
- Planned maintenance reporting automated from previously unwieldy spreadsheets

Housing Project Outcomes

Grants Management

- All forms now electronic and automatically generated at specific points in the process
- Departmental Grant Returns now automated
- Immediate process reporting on grants at each stage in the process (e.g. initial inspection, final inspection, etc.)
- Automated prompting based on time and / or events
- Headcount reduction of 1 full time equivalent

Housing Project Outcomes

Change Management

- Support from Senior Management Team
- Staff buy in secured early on
 - Project Sponsor, end users and I.S. involved throughout
 - Project team meetings & informal sessions
 - Initial fear/reluctance letting files go for backscan -> end users with ideas on how Laserfiche can be used to streamline and transform processes (e.g. craft workers and vehicle inspections)

Council Plan

- Multi-departmental roll-out - Laserfiche now in use to varying extents in Finance, MDs, I.S., and Corporate Departments
- Currently rolling out to HRM Department
- Planning Department and Museum on the roadmap to use the Laserfiche Public Portal

Laserfiche Product Suite

- Laserfiche Client – Desktop, Web & Mobile (iOS, Android, Windows)
- Workflow
- Forms
- Record Management
- Public Portal
- Unlimited Server Licence (Production, Test, DR etc.)
- Database options – MS SQL Server or Oracle
- Software Development Kit (SDK)

