

Regional Content Management, Process Automation and Digital Engagement

COST Technology Solutions for Towns **November 5, 2020**

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AGENDA

Connecticut Council of Small Towns – Technology Solutions for Towns

- ☐ Welcome
- ☐ Overview of Laserfiche Cloud
- ☐ Regional Approach
- ☐ GIS Document Integration
- ☐ Contract Management
- ☐ Electronic Permitting
- ☐ Questions

OVERVIEW OF LASERFICHE CLOUD

WHAT IS LASERFICHE CLOUD?

- ❑ Laserfiche Cloud is a secure online document management system.
- ❑ Does not require any on-site infrastructure or IT support staff. Users can upload, view, and work with content from a computer or on a mobile device
- ❑ Laserfiche offers users the ability to manage documents and records, capture content, build and use electronic forms, automate business processes, integrate with other line of business applications, and access advanced reporting and compliance tools, all within one integrated solution.



Search, Retrieve and Route

Quickly locate and route documents and information across your enterprise



Reduce Regulatory Risk

Protect your documents and reduce regulatory risk with WORM-based (write once read many) compliant storage



Control Access with Granularity

Set up and manage security rights from a user-friendly administrative console



Connect Your Systems

Integrate with ERP, CRM, SIS and GIS applications using no-code tools and robotic process automation



Leverage Powerful Security Tools

The Laserfiche SOC 2 Type 2 report includes security controls that are aligned with ISO 27001



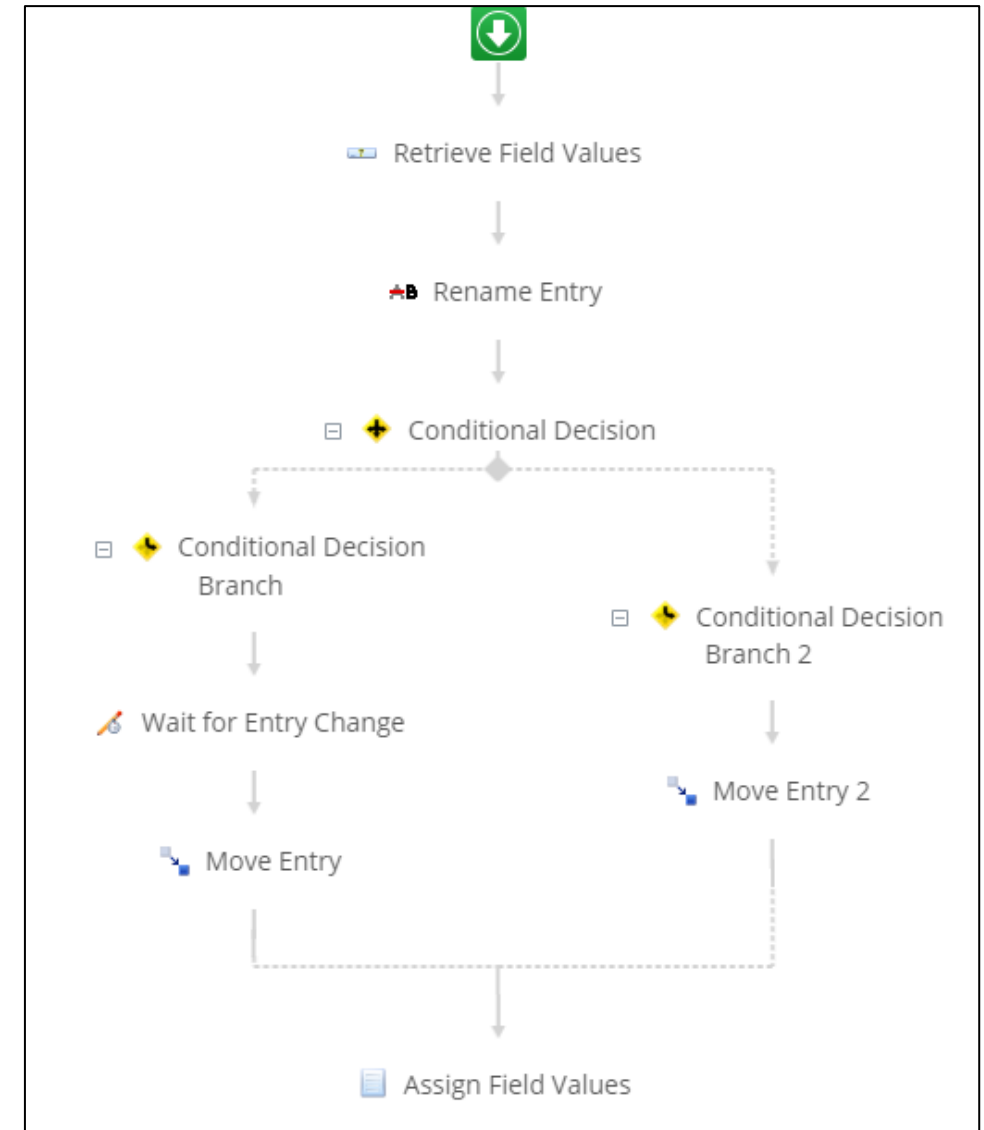
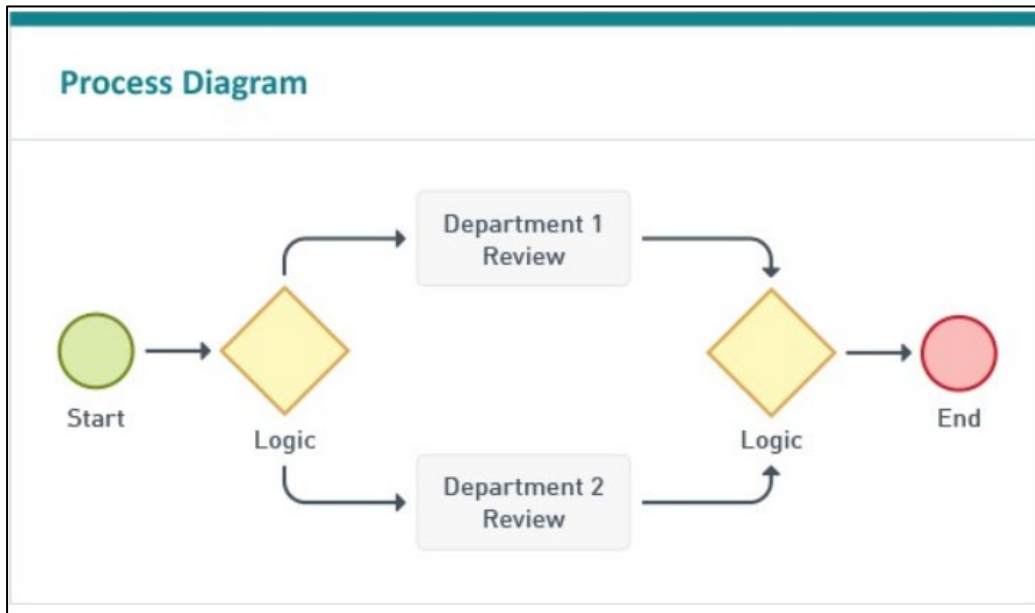
Execute Digital Signatures

Use DocuSign® to request digital signatures on your documents

OVERVIEW OF LASERFICHE CLOUD

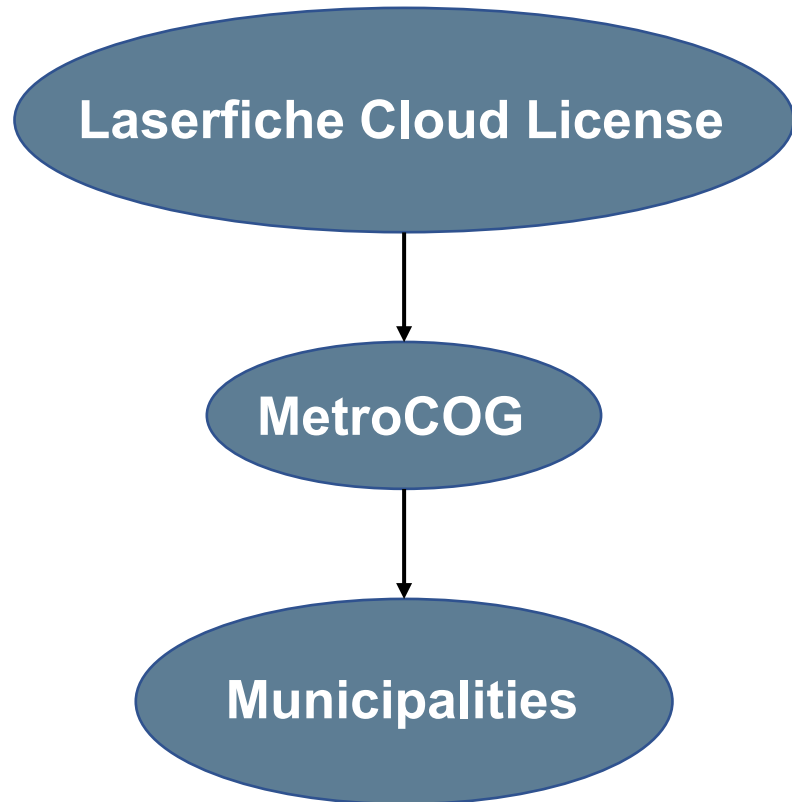
PROCESS AUTOMATION IN LASERFICHE CLOUD

- ❑ Promotes continuous productivity with rule-based routing, email notifications, activity monitoring and built-in reporting.
- ❑ Custom processes can be built using 150 tasks in the workflow editor.



REGIONAL APPROACH

REGIONAL SHARED SERVICE MODEL



- ☐ One regional license (annual)
- ☐ Separate Data Repository for each municipality
- ☐ Annual fee for each named user at MetroCOG and municipalities (users completing tasks in Laserfiche)
- ☐ Public Access, Public Form submissions, Workflows and Process Automation all included in single annual license fee

Example Cost Structure

Regional License (Annual): \$15,000

Full Cloud User (Annual): \$500

Example Municipal Cost

Regional License (Annual): \$2,100

Full Cloud User x 10 (Annual): \$5,000

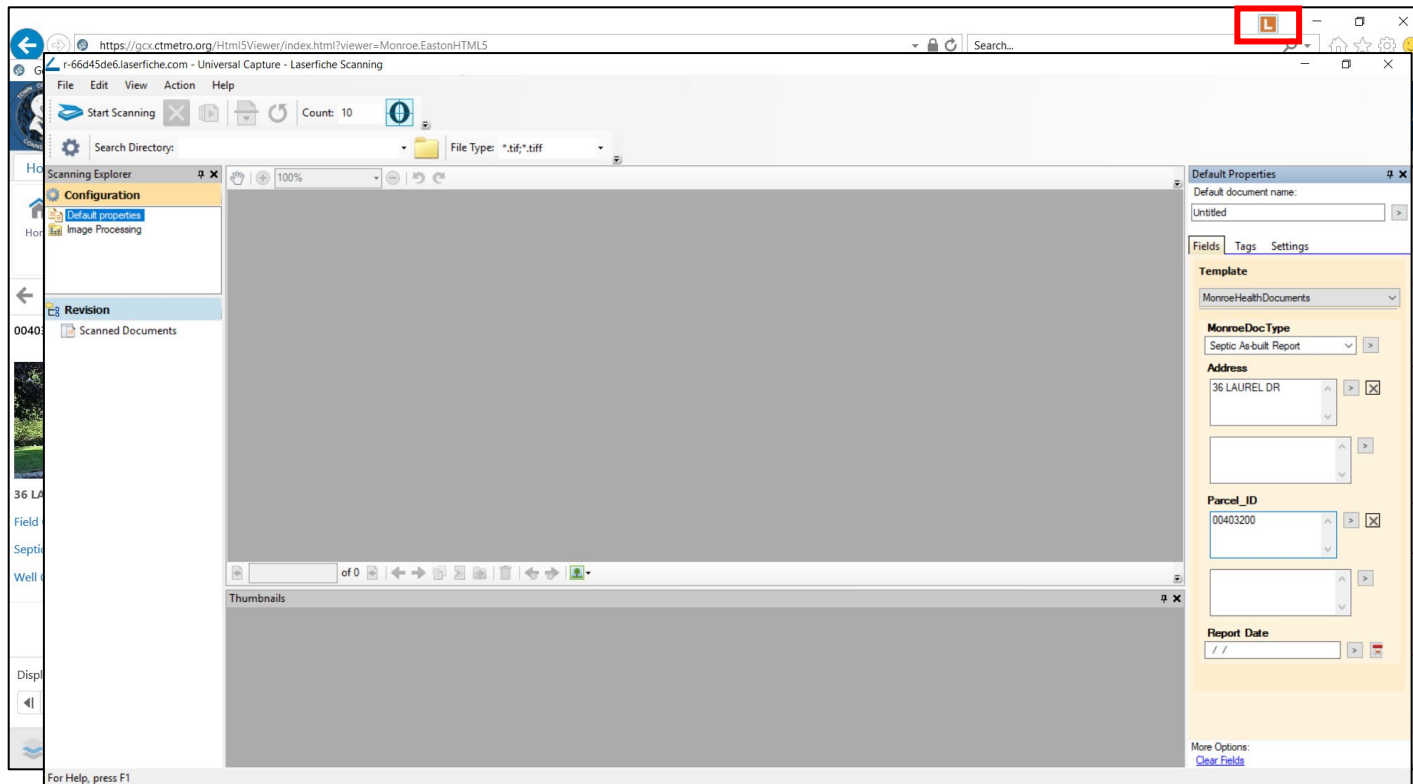
Total Annual Cost: \$7,100

GIS DOCUMENT INTEGRATION

CONTENT MANAGEMENT AND STORAGE

- ❑ The Monroe Health Department is using Laserfiche to scan & store septic as-builts and well completion reports.
- ❑ Files can be scanned directly from our GIS viewer or stored via an upload form.

SCAN



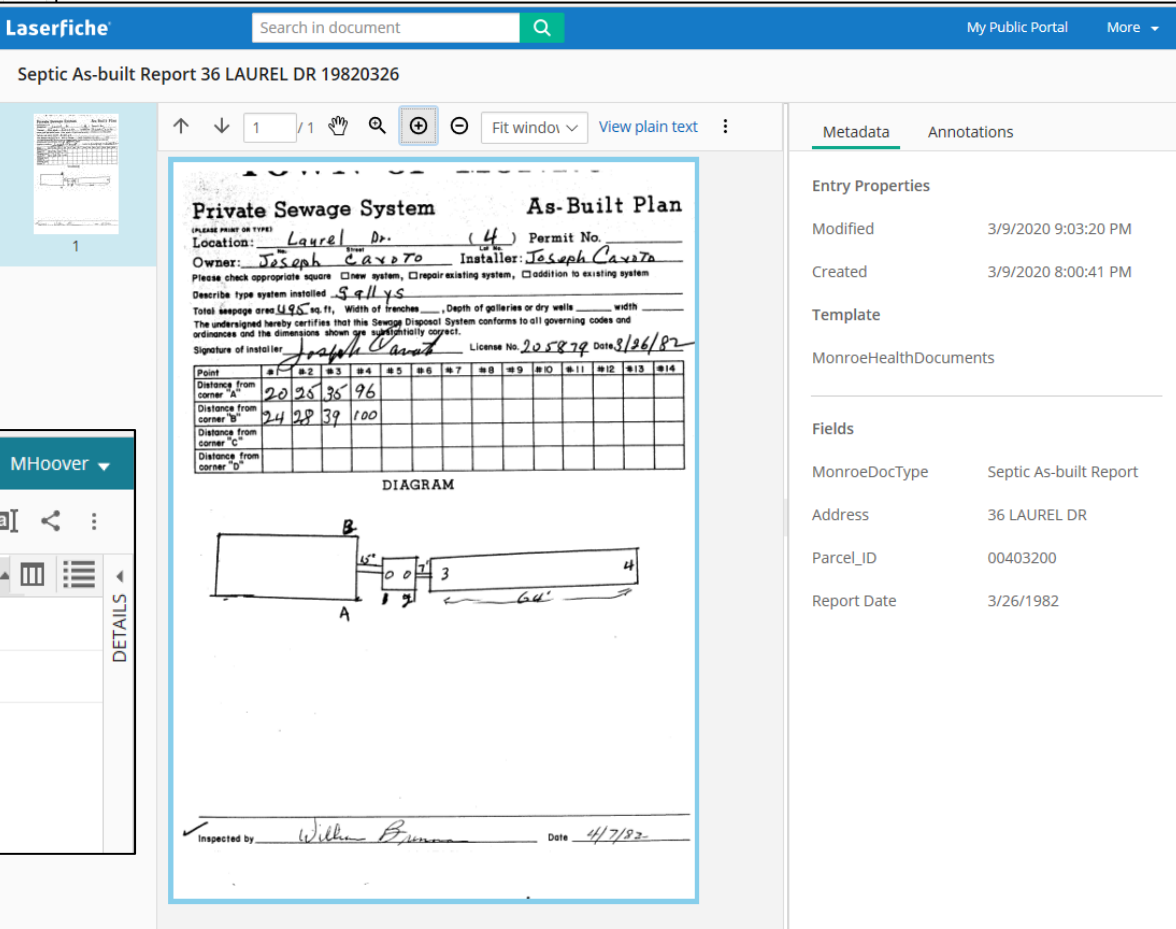
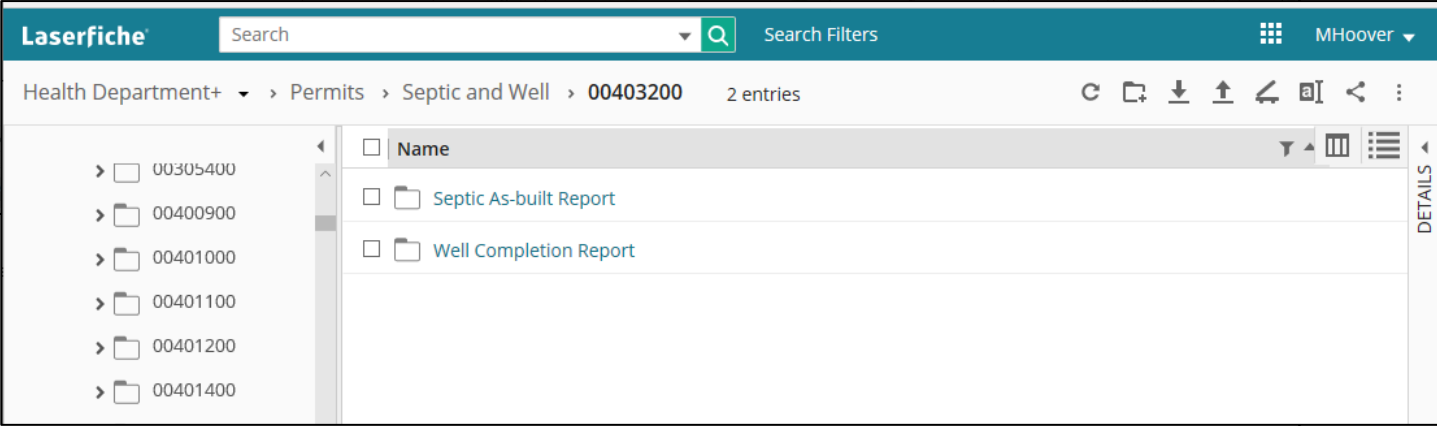
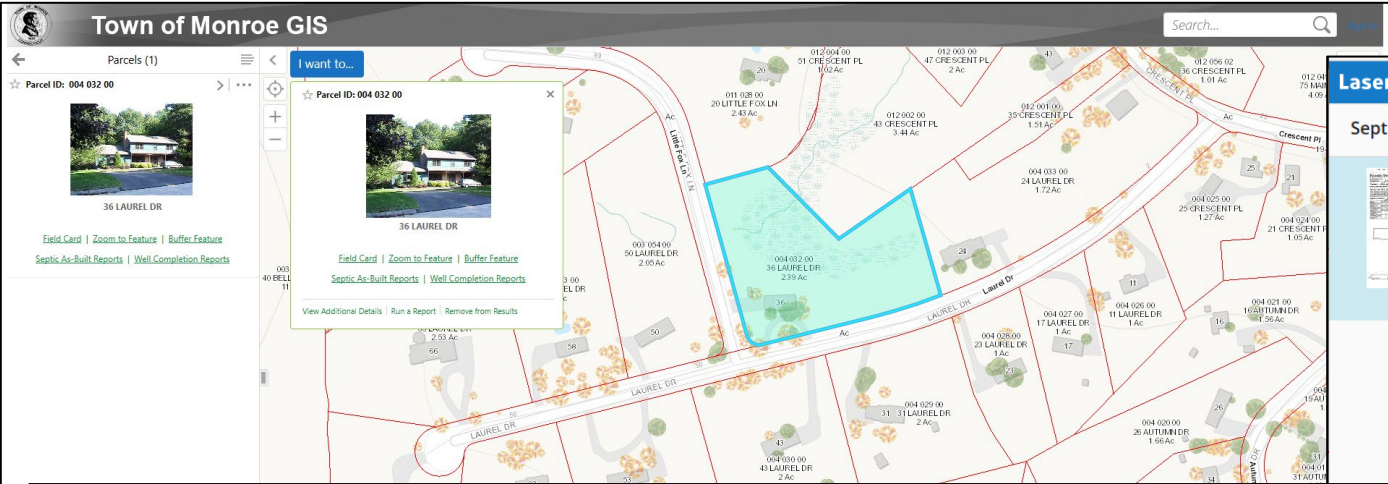
UPLOAD

A screenshot of a web-based upload form titled 'Monroe Health Documents'. The form contains several input fields: 'Document Type' (a dropdown menu set to 'Well Completion Report'), 'Address' (a text field with '36 LAUREL DR'), 'Parcel_ID' (a text field with '00403200'), 'Report Date' (a text field with a calendar icon), and 'File Upload' (a button labeled 'Select File to Upload'). A blue 'Submit' button is at the bottom left of the form area.

GIS DOCUMENT INTEGRATION

PUBLIC ACCESS TO DOCUMENTS


- Once documents have been scanned or uploaded, they are immediately available on the publicly available municipal GIS viewer.



CONTRACT MANAGEMENT

BUSINESS PROCESS EXAMPLE

- ❑ Monroe developed a contract management process to streamline department requests.
- ❑ Each department can submit a contract which initiates a workflow for approval.
- ❑ Contract and supplemental documents are stored and searchable in Laserfiche.
- ❑ Automated notification emails 30,60,90 days before contract expires/renews

**Monroe** CONNECTICUT Contract Management

Contract Status* (?) Submittal to First Selectman

Does this contract Renew?*

Yes

Contract Renews*

☒ Automatically ☐ By Option

In Perpetuity?

☐ Yes

Number of Renewals* (?)

2

Non-Renewal/Option to renew Notice Amount* (?)

30

Non-Renewal/Option to renew Notice Units*

Days before Contract Initial Term End Date

Contract Renewal Term Amount* (?)

1

Contract Renewal Term Units*

Years

Upload Contract*

Upload

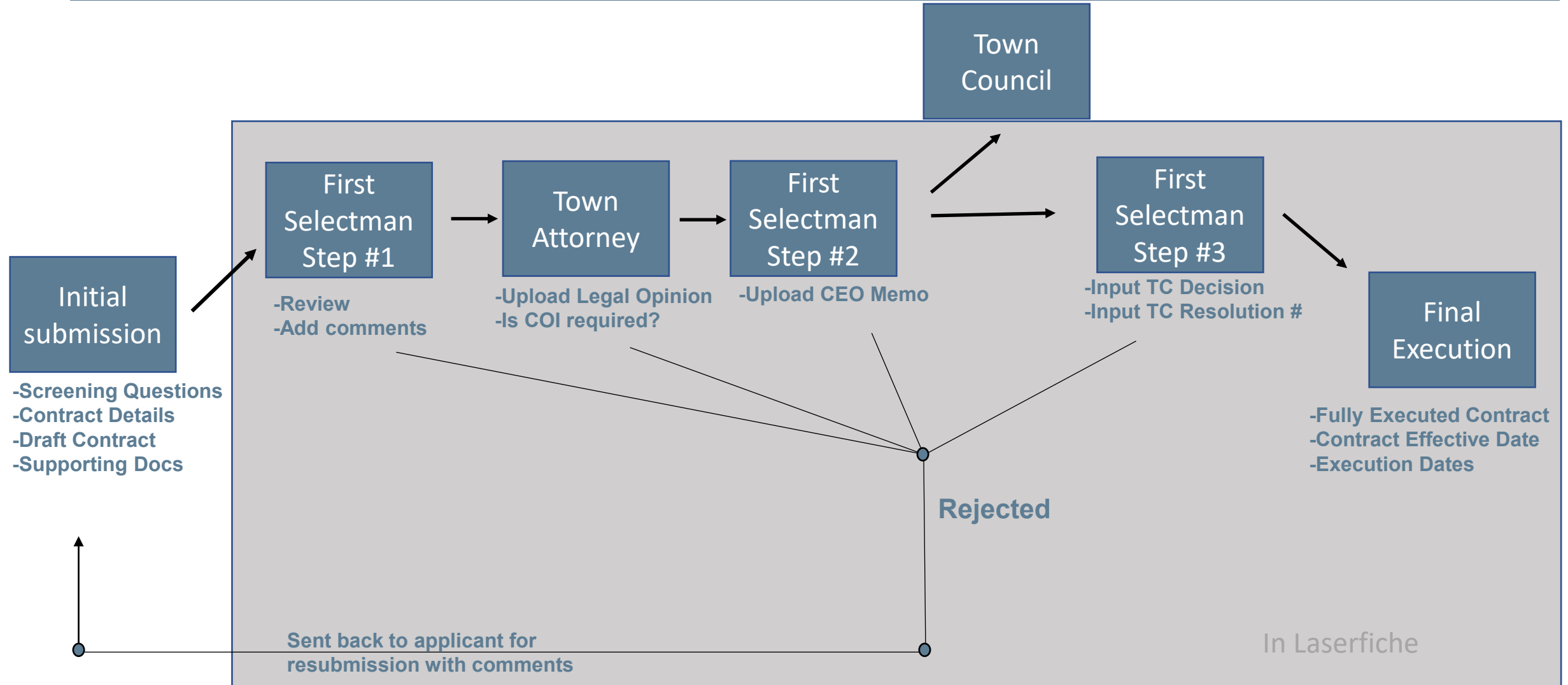
Supplemental Documents

Upload

Submit

CONTRACT MANAGEMENT

WORKFLOW



CONTRACT MANAGEMENT

REPOSITORY AND REMINDER

Laserfiche

Search

Search Filters

r-66d45de6 > Monroe > Police Department > Contracts > Executed > 2020 > Police Department - CT DOT - 9/16/2020 01

Emergency Medical Services

Engineering Department

Finance Department

Fire Marshal

First Selectman's Office

Health Department

Human Resources Department

Inland Wetlands Department

Legal

Monroe Fire Department

Police Department

Contracts

Executed

2020

Police Department

Police Department

Pending Execution

Submittal to First Selectman

Public Works Department

Name

Police Department - CT DOT - 9/16/2020 01 Marked Up Documents

FY 2021 Distracted Driving High Visibility Enforcement Fully Executed Contract

Police Department - CT DOT - 9/16/2020 01 Contract

Police Department - CT DOT - 9/16/2020 01 First Selectman III

Police Department - CT DOT - 9/16/2020 01 First Selectman Memo

Police Department - CT DOT - 9/16/2020 01 Fully Executed Document

Police Department - CT DOT - 9/16/2020 01 Legal Opinion

Contract Option Deadline in 60 Days - Message (HTML) (...)

File Message Help Laserfiche Tell me what you want to do

Find Zoom

Contract Option Deadline in 60 Days

LN

Laserfiche Notification <donotreply@laserfiche.com>

To Brian Offsey

6/18/2020

The following contract has an option that must be exercised within 60 days:
<https://webaccess.laserfiche.com/laserfiche?index.aspx?db=r-66d45de6#id=25210;view=pages>

Please indicate whether or not you have exercised the option on the following form:
https://app.laserfiche.com/forms/D1rAN?Entry_ID=25210

ELECTRONIC PERMITTING

NON-RELATED TRADE PERMITS

- ☐ Monroe is currently migrating to an electronic permitting system built in Laserfiche.
- ☐ The electronic permitting will allow residents and contractors to submit permit applications, payments, and supporting documentation for projects.
- ☐ The system will reduce traffic at town hall, expediate the process, and provide transparency as permits are processed.
- ☐ We are initially building a non-related trade permit application that will end up being a simplified version of the overall building permit application.

ELECTRONIC PERMITTING

DIGITAL PERMIT FORMS

❑ The first step was to create digital permit forms

Plumbing

TOWN OF MONROE
Building Department

Application for PLUMBING PERMIT

Date: _____ Permit No. _____

Job Location No. _____ Street _____

Name of Owner: _____ Phone: _____

Address if different: _____

Nature of Work: ☐ _____ ☐ _____ ☐ _____

Piping Material: ☐ _____ ☐ _____ ☐ _____

Location: ☐ Water Closes ☐ Lavatories ☐ Bath Tubs ☐ Sinks ☐ Showers

Location Type: _____

All work done shall comply with _____

Other: _____

Homeowner: _____ First Name _____ Last Name _____

Master Plumber: _____ First Name _____ Last Name _____

State License No.: _____

Firm Name or Trade Style & _____

Email: _____

Cost of Work: _____

Electrical

TOWN OF MONROE
Building Department

Application for Electrical Wiring Permit

Permit No. _____

Job Location: _____ Lot No. _____ Date: _____

Name of Owner: _____ Address: _____ Telephone No. _____

Nature of Work: ☐ New Installation ☐ Alteration ☐ Addition ☐ Other (Specify): _____

TYPE OF BUILDING: _____

TYPE OF OCCUPANCY: _____

TOTAL COMPUTED LOAD (In Watts): _____

NO. OF BRANCH CIRCUITS: _____

APPLIANCE LOAD RATING (In KiloWatts): _____

TYPE OF WIRING SYSTEM: _____

LOCATION: ☐ Light ☐ Heat ☐ Recpt. ☐ Switch ☐ H.R.

CRS# _____

SIZE OF SERVICE: _____

CONDUCTOR SIZE: _____

TYPE OF POST: _____

Lighting Fixture: _____

NOTE: On request of the _____

All work done shall comply with _____

Master Electrician: _____

Permit Name or Trade Style & _____

Email: _____

Cost of Work: _____

HVAC

TOWN OF MONROE
Building Department

APPLICATION FOR HEATING PERMIT

Permit No. _____

Job Location: _____ Lot No. _____ Date: _____

Name of Owner: _____ Address: _____ Telephone No. _____

Nature of Work: ☐ New Installation ☐ Alteration ☐ Addition ☐ Other (Specify): _____

TYPE OF BUILDING: _____

TYPE OF OCCUPANCY: _____

TOTAL COMPUTED LOAD (In Watts): _____

NO. OF BRANCH CIRCUITS: _____

APPLIANCE LOAD RATING (In KiloWatts): _____

TYPE OF WIRING SYSTEM: _____

LOCATION: ☐ Light ☐ Heat ☐ Recpt. ☐ Switch ☐ H.R.

CRS# _____

SIZE OF SERVICE: _____

CONDUCTOR SIZE: _____

TYPE OF POST: _____

Lighting Fixture: _____

NOTE: On request of the _____

All work done shall comply with _____

Master Electrician: _____

Permit Name or Trade Style & _____

Email: _____

Cost of Work: _____

Masonry

TOWN OF MONROE
Building Department

CHIMNEY AND FIREPLACE FORM

Permit No. _____

Job Location: _____ Lot No. _____ Date: _____

Name of Owner: _____ Address: _____ Telephone No. _____

Nature of Work: ☐ New Installation ☐ Alteration ☐ Addition ☐ Other (Specify): _____

TYPE OF BUILDING: _____

TYPE OF OCCUPANCY: _____

TOTAL COMPUTED LOAD (In Watts): _____

NO. OF BRANCH CIRCUITS: _____

APPLIANCE LOAD RATING (In KiloWatts): _____

TYPE OF WIRING SYSTEM: _____

LOCATION: ☐ Light ☐ Heat ☐ Recpt. ☐ Switch ☐ H.R.

CRS# _____

SIZE OF SERVICE: _____

CONDUCTOR SIZE: _____

TYPE OF POST: _____

Lighting Fixture: _____

NOTE: On request of the _____

All work done shall comply with _____

Master Electrician: _____

Permit Name or Trade Style & _____

Email: _____

Cost of Work: _____

Monroe CONNECTICUT

Trade Permit Application Form

Permit Type*
Electrical

Property and Owner Information

Address Line 1

Address Line 2

Owner's First Name

Owner's Phone Number

Permit Applicants Information

Check box below if Owner and Applicant are
☐ Check
Applicant's First Name

Applicant's Phone Number

Electrical Permit

Nature of Work
☐ New Installation ☐ Addition ☐ Revamp

Type of Building
☐ Frame ☐ Masonry ☐ Metal ☐ Other

Type of Occupancy or Use

Total Computed Load (In Watts)

No. of Branch Circuits

15amp _____ 20amp _____ 30amp _____ Special Circuits _____

Appliance Load Rating (In KiloWatts)

Range _____ Hot Water Heater _____ Clothes Dryer _____

Type of Wiring System
☐ Armor Clad(BX) ☐ Non Metallic Cable ☐ EMC ☐ Other

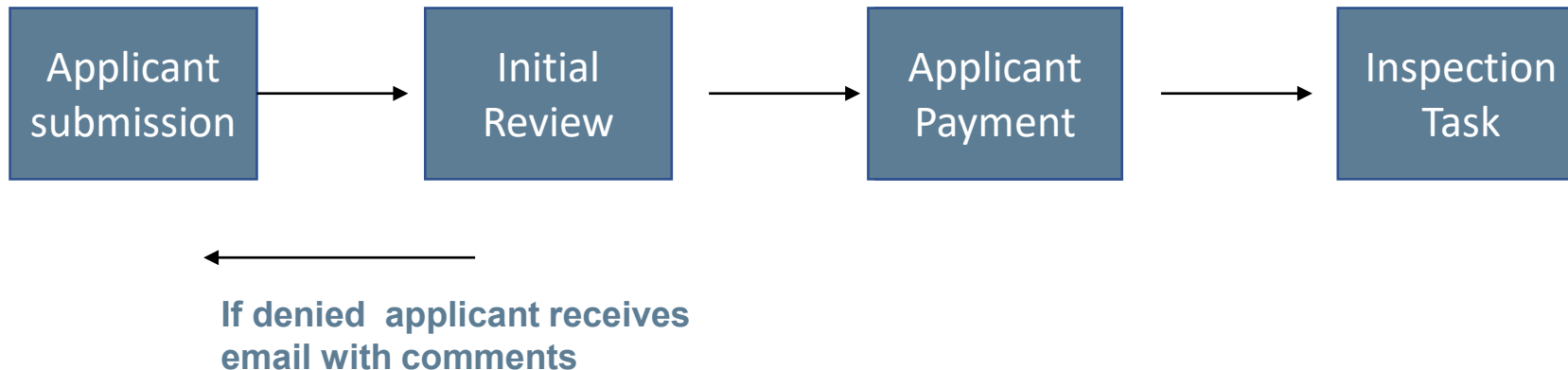
Outlets and Motors Table

	Light	Heat	Recpt.	Switch	No.	H.R.
Cellar	_____	_____	_____	_____	_____	_____

ELECTRONIC PERMITTING

PAYMENT AND INSPECTION

- ❑ Payments will be submitted after an initial approval by the building inspector.
- ❑ After payment is made, the building inspector will be assigned an inspection task.
- ❑ Inspection task will approve or reject with violations noted.
- ❑ If denied, then applicant will receive email with violations noted and follow up inspection will be scheduled.



NEXT STEPS



- ☐ Develop the full electronic building permit application, using the non-related trade permits as a template.
- ☐ Continue to build out additional processes for the Town of Monroe including Town Clerk licensing, land use records, historic documentation, agenda management, FOIA compliance.
- ☐ Modify existing workflows for quick and easy implementation across the region.
- ☐ Develop processes and workflows for use at MetroCOG including traffic count request form, electronic Transportation Improvement Program (TIP), Contract Management.

THANK YOU!



QUESTIONS?

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mhoover@ctmetro.org