

## Making Integration Just a Click Away

Cary, NC, leverages Laserfiche as integrative middleware to deliver shared library services to its departments

With a diverse population of over 141,000, the Town of Cary is the seventh largest community in North Carolina. Since coming to Cary 21 years ago, Technology Services (TS) Director Bill Stice has developed a proactive approach to the role of TS. “The public sector is really several businesses under a single umbrella,” he observes.

This proactive strategy has evolved in Cary’s TS department, which has begun servicing the town’s business units as a business unit itself. As Stice puts it, “Every year, I don’t submit a technology plan—I submit a business plan.”

Whenever possible, TS follows an internal shared services model. The challenge, Stice says, is accommodating “fairly dissimilar” business processes with the same technology foundation, so answering to these unique needs has made agility an important factor in infrastructure investments. “When we look at purchasing new applications, we want them to be flexible enough to meet departmental needs, but able to be tied together with everything else when we need it to be.”

Stice offers the town’s GIS system as an example. “Everything we do is geo-spatial,” he explains. “Addresses are used and shared by departments. But where the Engineering Department does business by project number, Planning uses case numbers.” TS must find a way to accommodate the unique ways individual departments work with information, while still providing a common foundation to link that information together across departments.

“We want the business to drive the software, not the software to drive the business,” Stice concludes.

### The Need: Uniting Content and Contract Management

This was the mindset in 2003 when Rodney Overton, one of Cary’s three business analysts, first looked at enterprise content management (ECM) to manage the 300+ contract documents received annually by the Town Clerk’s Office. Town staff was accessing contract documents by traveling to the Clerk’s Office, having the clerk look up reference numbers from an AS/400-based Contract Control System (CCS), then locating the paper contract from a labyrinth of file cabinets and making copies. The search was on for a more efficient way.

Overton was aware that many North Carolina municipalities already were using Laserfiche as their ECM system, so he contacted Kevin Smith of Laserfiche reseller One Source Document Solutions to learn more. Smith demonstrated how, using Laserfiche, staff in the Clerk’s Office could scan and store contracts while making them available to town staff—right from their desktop computers.

Overton recalls easing staff concerns following a prior experience with a cumbersome imaging system. “Laserfiche had an easy-to-use Windows look and feel everyone could see themselves using,” he recalls. For his part, he liked how Laserfiche Web Access could create URL shortcuts to documents. “I saw tremendous potential for integration with a lot of our primary departmental applications as we rolled it out.”

### Organization Profile

Located in the heart of North Carolina’s Research Triangle region, Cary is the seventh largest municipality in the State.

### Situation

Rodney Overton, one of Cary’s three business analysts, first began investigating enterprise content management (ECM) to manage the 300+ contract documents received annually by the Town Clerk’s Office.

### Solution

Overton was aware of Laserfiche as the top ECM choice for North Carolina municipalities. In spring 2003, implementation took place in the Clerk’s Office, with the Engineering Department and the Police Department following shortly after.

### Benefits

- Besides Engineering, the Town Clerk’s office and the Police Department, the Parks and Recreation and Planning Departments have also implemented Laserfiche, with plans to expand to the Accounting Department as well as Inspections and Permits.
- With just a single hotkey, an AS/400 CL program uses the contract control number in the contract control system to display all related contract documents stored in Laserfiche.
- An integration between the town’s GIS software, MapInfo, and Laserfiche allows users to click an address, select a project and launch a search to pull up a list of all related project documents.

### Processes

AS/400 integration  
Business planning  
Contract management  
GIS integration  
Legacy system migration  
RMS integration  
Sungard integration

In spring 2003, implementation took place in the Clerk's Office. The Engineering Department followed a month later, presenting the challenges of larger document volume as well as different types of documents. Laserfiche's ability to categorize documents according to several template fields proved significantly effective. "We started out with 15 template fields, which we've narrowed down to the seven that we use today," Overton says. "In 2007, 'Project Number' and 'Document Type' fields became very useful as we began to find ways to integrate Laserfiche with our GIS software, MapInfo."

Rounding out this initial deployment, One Source assisted the Cary Police Department with a massive migration of some 190,000 documents from its legacy imaging system to its own volume within the Laserfiche repository. Since then, the Cary Police Department has added more than 10,000 documents a year to Laserfiche.

### System Integrations "Just a Click Away"

A 2006 upgrade to Laserfiche 7.2 brought with it enhanced opportunities to integrate Laserfiche with line-of-business applications. "Laserfiche 7.2 allowed you to save searches; we felt that if you could save a search in Web Access, then you should be able to execute a search using a URL link," Overton says. "We were able to create a URL search where we could pass search information from a simple browser shortcut and have Web Access perform a search and pull up the desired documents."

Overton soon wrote an AS/400 CL program that uses the Contract Control Number in the Contract Control system to display a contract in Web Access. While users are viewing contract information on the Contract Control System, all they need to do is press a hotkey to initiate a Web Access search that displays the contract image in detail.

"Now users don't even have to log into Laserfiche—with the press of button they can see all related documents for a contract," he says.

A few months later, Overton developed another "hotkey" integration for Cary's MapInfo GIS software. With this

integration, a MapInfo user only needs to click an address, select a project and a search is launched that pulls up a list of all related project documents in Web Access—quickly focusing searches.

To simplify multi-template searches, Overton—along with co-workers Wilson Farrell and Ken Guttman—created a small internal Website to perform central searches using Web Access. "Instead of running into character limitations with MapInfo when we have more than one template search, we can pass critical information to an internal Website to launch the remaining portion of the script," says Overton. "This helps to minimize the character length of the URL needed for integrating into other applications."

### Creating a Standard for Imaging—and Image-Enablement

This image enablement has proven so useful Overton says he's now looking at ways to integrate Laserfiche with the Police Department's RMS software as well as the Accounting Department's Sungard Public Sector financial software.

"You're talking about tremendous cost savings when you don't have to consult with a third party to write an integration. For our MapInfo integration, if we had to hire a consultant, it would have been at least \$10,000, if not more. Multiply that per application and the savings can really add up," Overton says. "The way we are able to link to documents in Laserfiche from another application really makes a difference in terms of value and functionality."

As such, Laserfiche has become the integrative middleware used by several departments to access and share content. Besides Engineering, the Town Clerk's Office and the Police Department, the Parks and Recreation and Planning Departments have also implemented Laserfiche, with plans to expand to the Accounting Department as well as Inspections and Permits.

"Laserfiche has become a strategic application," Stice says. "It's the standard we use to manage paper and it's the only one we use to access that information and tie it to information in other applications."

### About Laserfiche

A resource for more than 28,000 public- and private-sector organizations around the world since 1987, Laserfiche creates simple, elegant enterprise content management solutions that help organizations run smarter. From streamlining digital records management to automating the agenda process, Laserfiche helps improve efficiency while integrating easily within any environment.

### Your Next Step

Please call **(800) 985-8533** or e-mail [info@laserfiche.com](mailto:info@laserfiche.com) for more information.

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