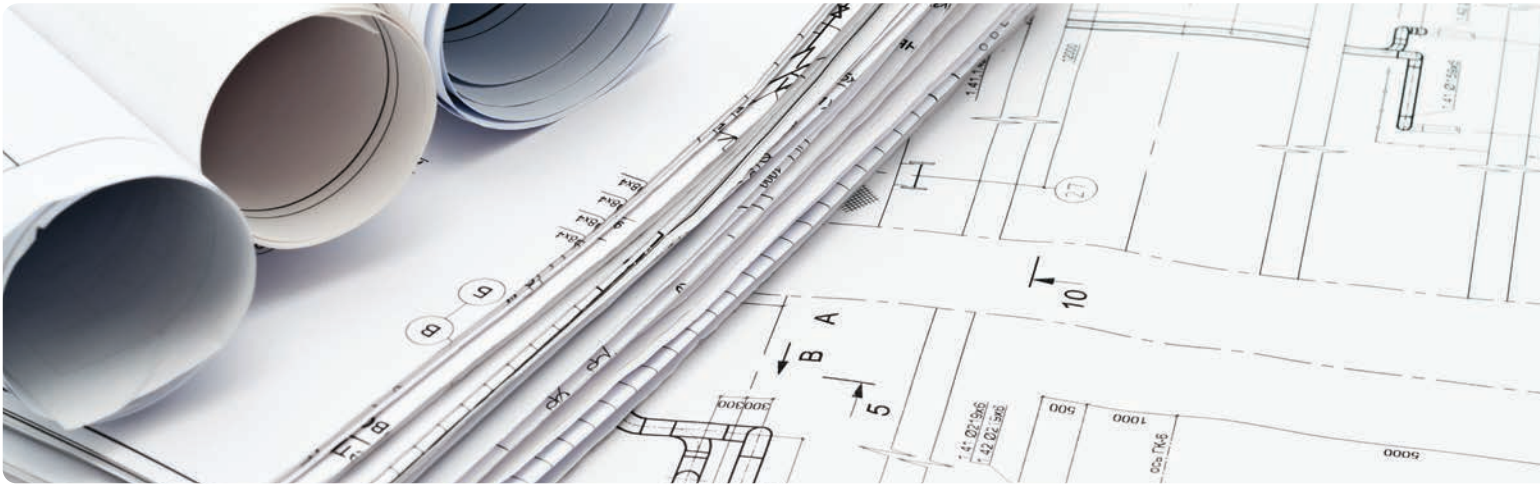> "The public works team at Docufree clearly demonstrated that they understood our challenges and had specific solutions that could be customized to address our unique needs. Docufree has delivered on everything that it promised."
>
> Lori Moran, Account Clerk, Town of Watertown

Industry: Municipal Government

Application: Public Works Records

Location: Watertown, MA

Docufree Solutions: Public Works Records Management Platform, Audit Trail, Onsite Photo Uploads

Town of Watertown, MA

Docufree Puts Watertown's Public Works Department on Solid Footing

Public Works Departments face a myriad of operational challenges. Projects can be both foreseeable (e.g. scheduled maintenance) and unpredictable (e.g. emergency repairs and replacements), making planning that much more difficult. Public Works Departments are also under constant pressure to deliver projects better, faster and cheaper which is forcing staff to look for smarter ways of doing business. Access to accurate information is critical to ensuring projects are started and completed in the most efficient and timely manner. Part of the Greater Boston area, Watertown is a city closing in on four decades of existence, located in Middlesex County,

Mass., and bordered by the Charles River. Like many towns in the Northeast, "Father Time" and the weather elements have not always been kind to Watertown's infrastructure—as well as its paper records.

Watertown's Public Works Department had been storing thousands of paper documents for decades, some dating back to 1929. Document types included large-format building and highway plans, sepia photos and prints, as well as blueprints both rolled and flat. All of the Town's public works records were stored in one big room made up of rows of file cabinets and mountains of boxes. The Department had slowly started scanning those documents and uploading the information to an external hard drive.

However, according to Lori Moran, account clerk for the Town of Watertown, an unfortunate roof collapse that caused water damage prompted the Department to make the decision to aggressively move forward with digitizing more of its documents.

"We had files in drawers, flat files in cabinets, and boxes upon boxes of blueprints," Moran said. It was extremely

difficult to keep them in any type of order. The fact that so many different people touched those documents increased the chances of them getting misfiled."

Fortunately, one of the Department Engineers had already started the digitization process and began working with Docufree to scan some of the oldest documents and upload them to an external hard drive. Unfortunately, as a result of the Engineer's untimely passing, the digitization project went stagnant—that is until Moran came on board. Her goal was to get the rest of the documents scanned, then integrated with a records-management platform that would offer the following solutions to ongoing problems in the Department:

- A way to update and integrate existing Microsoft Access database information;

- 24/7 access from anywhere to all documents at the Public Works Department for multiple staff members, especially in the event of a water main break or other emergency;

- Secure back-up for all the paper files that had been created and scanned;

- Ability to add notes and field photos to project files;

docufree®

• A better process with easy-to-use technology that would encourage the engineers and highway departments to keep up with uploading and updating their documents; and

• Search functions and a more efficient way to look up information contained on both cards and maps.

The number and types of different documents involved in a single Public Works project are numerous. As an example, just to update a portion of a roadway within Watertown, the Department first requires initial documents from the contractor. Until it gets to the final stage, there's approximately 15 to 20 sets of documents involved before the project gets underway.

"The final plans actually show what the road and surrounding areas are going to look like—those are perhaps the most important documents to digitize," said Moran. "Unfortunately, sometimes people

forget to either file or dispose of previous plans, so we had all 15 to 20 sets being stored. The project book itself is probably 100 pages, plus at least 20 pages of plans. I knew that having everything be submitted digitally would make the projects that much easier to manage.

Moran recognizes that municipalities' acceptance and use of technology often lags behind the rest of the business world. "When I first started here, everyone was still writing things down in a ledger. While the roof collapse certainly spurred our digitization efforts, as we've continued to hire younger staff who are up with current technology, we are making a commitment to do away with paper for good."

Docufree's Records-Management Platform Scans, Indexes and Seamlessly Manages Information
The Town of Watertown had engaged with Docufree on the initial scanning and uploading of documents to the external hard drive, so when the Department made the choice to move full steam ahead with a new records-management platform, the decision to stay with the same company was an easy one.

"It was quite the challenge to scan that first group of documents to begin with and Docufree did an outstanding job," Moran said. "The public works team at Docufree clearly demonstrated that they understood our challenges and had specific solutions that could be customized to address our unique needs. Docufree has delivered on everything that it promised."

Docufree set the Department up on its

cloud-based, public works records-management platform, adding in solutions to allow for audit trails of information updates and onsite photo uploads. In totality, the new platform allows Moran and other staff members to easily scan in all their documents and/or maps, scan or upload photos, index those documents and then seamless manage the information, allowing for new-found search functionality.

"We've been the most pleased with everyone involved with Docufree's customer service—from the account reps to their designers and programmers," Moran said. "At the time that we launched the platform, we only had one person in IT who just had to handle the network permissions. Docufree handled everything else. They were able to customize all platform functions in order to make it as easy as possible for the different users—the engineers, public works and planning department staff as well as the highway supervisors. Everyone has always been extremely responsive if there was ever an issue. It's just been an incredible experience."

Watertown's Public Works Department's new records-management platform uses a combination of innovative technologies, capabilities and customer service to:

• Scan all paper records to create a back-up, including index-card-sized connection documents and large-format paper maps;

• Digitize data from sewer and water records as well as building and highway plans, and create fields for users' specific search requirements across multiple criteria (i.e. by address, last name, etc.);

> "It has saved a huge amount of time having all our documents web-based and accessible at any time of the day or night and from anywhere. It's just so much easier and a significantly more efficient use of our staff's time."

- Provide a secure, cloud-based search-and-retrieve data repository that protects critical infrastructure information from cyber attacks and intrusions;

- Add a "notes" field that requires users to enter reasons for updates or changes to records, providing an audit trail with a timestamp and user name;

- Take and upload photos onsite for services being worked on in real time; and

- Allow for additional file uploads to support documentation as needed for each record.

"I was personally processing 200 to 250 water and sewer cards a month so you can understand how challenging it would be for one person to manage this volume of documents in paper form," said Moran.

Public Works Solution Produces 50% Time Savings, Especially Valuable for After-Hours Emergencies

Moran believes the Department is realizing a 50-percent time savings since the implementation of Docufree's records-management platform, especially when it comes to dealing with after-hours emergencies. Previously, staff would have to visit the site to assess the situation, then come back to the Public Works department, pull the file, and bring it back out to the site with them.

"It has saved a huge amount of time having all our documents web-based and accessible at any time of the day or night and from anywhere. It's just so much easier and a significantly more efficient use of our

staff's time," Moran said.

Since the new records-management solution was implemented, the Town of Watertown has realized these tangible results in its Public Works Department:

- Field crew and front-office staff have instant access to the same data;

- Less downtime is required when cross-referencing files or searching through paper maps;

- Audit trails for updated records now capture the person making the change, date, and time in addition to a reason for the modification;

- In the event of an after-hours emergency, there is no need for staff to spend countless hours physically traveling to the Public Works Department, unlocking the office and sorting through files of paper records; and

- The new dashboard allows notifications to automatically be sent to all users, showing the most recent updates made to records.

"The self-service dashboard is very intuitive," said Moran. "The fact that everything is so simple to use is a big plus for our different work styles."

Technological progress for smaller towns such as Watertown can be slow, but Moran believes the Public Work Department is now on the right track. "Our new boss is very young and he's on board with digitizing

everything. I see a day in the not-too-distant future where we'll be directly integrated with the Planning Department and no one will have to exchange and/or store paper documents anymore."

About Town of Watertown, MA

Located six miles west of Boston, Watertown is one of the oldest towns in Massachusetts. Since Watertown's founding in 1630, the community has evolved from an original Puritan Settlement based on agriculture into a hub for trade and commerce, then becoming a key industrial center, and now transitioning into a post-industrial community with a mix of cultural, racial, educational, and economic diversity. Watertown is a place where residents appreciate and benefit from a strong sense of community, diverse urban neighborhoods, robust school system, rich culture, and a number of people that live and work in town. To learn more, visit www.watertown-ma.gov.

About Docufree

Docufree is a business process services provider of large-volume document scanning, cloud-based document management, and intelligent process automation. Since 1999, Docufree has securely managed and modernized how people and the systems they use every day interact with data and each other, driving measurable outcomes for both clients and their customers—from providing an on-ramp to digital transformation to automated invoice processing, human resources and customer communications.

docufree®