

Workflow Integrations Standardize Records Management Across Multiple Locations

United Road Towing delivers Workflow templates, code and tips for custom integrations.

Contributed by: Sheila Gallegos, Project Manager, United Road Towing

United Road Towing built a custom integration between Laserfiche Quick Fields, Workflow and towing software that gathers data from scanned vehicle barcodes, driver invoices and customer-submitted documents. The integration makes previously disconnected information readily available to multiple departments and provides in-depth documentation on the towing process.

“Laserfiche has helped us to streamline our processes but also makes sure that the processes are the same from location to location.” — Sheila Gallegos, Project Manager. The company worked with Laserfiche to create a custom Workflow script with an HTTP post to retrieve data from the towing software’s closed database. The script automatically pulls information from the towing software to fill in additional data in Quick Fields about the document after the barcodes are scanned:

- When the company tows a vehicle, the tow truck driver places a bar code sticker on the vehicle to identify it in the vehicle inventory and places a barcode on the storage report:



806499



806499
#32 KR.
11-18-11
PPI

**URS Southwest, Inc.
Vehicle Storage and Inspection Report**



| | | | |
|--|--|--|--------------------------------------|
| Law Enforcement Information Please answer the following questions. If YES, have officer initial appropriate "Yes" box. | | Vehicle Condition <input type="checkbox"/> Drivable <input type="checkbox"/> Wrecked <input type="checkbox"/> Vandalized <input type="checkbox"/> Stripped <input type="checkbox"/> Burned <input type="checkbox"/> See Remarks | |
| Is this tow an owner's request? () Yes () No (i.e. did the vehicle owner or operator request this towing company) | | | |
| Is this a special situation? () Yes | | | |
| <input type="checkbox"/> Canal | <input type="checkbox"/> Swimming Pool | <input type="checkbox"/> 4x4 | <input type="checkbox"/> Rollover |
| <input type="checkbox"/> River Bottom | <input type="checkbox"/> Desert | <input type="checkbox"/> Barrier Cable | <input type="checkbox"/> Other _____ |
| Year _____ Make _____ | | Model _____ Style _____ | |
| Color _____ License # _____ | | State _____ Lic. Yr. _____ | |
| Towing Company Name _____ | | Storage Yard Address _____ | |
| Vin # _____ | | Odometer _____ | |
| Remarks _____ | | | |
| Is this a "PCC-36"? () Yes | | | |
| If there is a Police Hold, please write the agency report number and the phone number to call to get the hold released. | | | |
| 30 Day Hold ARS-28-3511 () Yes | | Boot and Tow () Yes | |
| Agency Report # _____ | | Phone # _____ | |
| PCC 23-55 () Yes | | | |
| Is this Tow to be billed to the Public Agency ordering the tow? () Yes () No | | | |
| Signature & Badge Number _____ | | Date of Contact With Vehicle _____ | |

Called By PPI Date 1/10/11 Time In 12:00

Shamrock Durango 40th Street Other Keys Y R
 AVI North Fast Radio Y N **Released!**

Pick Up Location 12198 McClintock


Towed Mileage _____ Flat Bed Wheel Lift Front Rear

Recovery Time _____

- Storage facility staff scans the storage report with the barcode into Laserfiche.
- Quick Fields reads the barcode, places the inventory number into a field and saves the storage report into the Laserfiche repository:

28% Samples

URS Southwest, Inc. Vehicle Storage Report



785745

Law Enforcement Information
Please answer the following questions. If YES, have officer initial appropriate "Yes" box.

Is this tow an owner's request? Yes No
(i.e. did the vehicle owner or operator request this towing company)

Is this a special situation? Yes

Canal Swimming Pool 4x4 Rollover
 River Bottom Desert Barrier Cable Other _____

If there is a Police Hold, please write the agency report number and the phone number to call to get the hold released.

30 Day Hold ARS-28-0511 Yes Hold Other Yes Boot and Tow Yes

Agency Report # 2010-00297588 Phone # 602-495-5004

Is this Tow to be billed to the Public Agency ordering the tow? Yes No

Signature & Badge Number of Officer Ordering Tow: [Signature] 9455

Called By: PPD Date: 3/1/10 Time is: 1924

Year: 97 Make: INTERNATIONAL Model: 4700 Style: 442

Color: GREEN License #: NONE State: _____ Lk. Yr. _____

Vin #: 1HTSCAAM9VH479019

Sternrock Durango 40th Street Other _____ Keys Y N
 A/V North Fast _____ Radio Y N

Pick Up Location: 3300 W. JACKSON ST

Towed Mileage: _____ Flat Bed Wheel L/R Front Rear

Recovery Time: _____

Have you documented damage? Yes No

Driver's Name: Jim Driver #: 33 Truck: 1600

Driver Signature: [Signature]

Misc. Tow Information / Special Tow / Damage: cab and chase only Lt Glass broken

Vehicle Storage Report

Default document name:
JRT-AZ Storage Report %([Bar Code Inv]

Fields Tags Properties

Template: Storage Report

Stock #
[([Bar Code Invoice #])

Customer
[]

Tow Date / Time
/ / :

Requesting Party
[]

VIN
[]

License Plate State
[]

License Plate #
[]

Vehicle Color
[]

Vehicle Make
[]

- The custom Workflow script runs a session that searches the towing database using the barcode and fills in additional sections in Quick Fields with retrieved information about the vehicle, such as the vehicle's make, model, year, VIN number as well as customer information, invoice and payment dates:

```
Laserfiche TOPS Lookup Service.exe.config - Notepad
File Edit Format View Help
<?xml version='1.0' encoding='utf-8'?>
<configuration>
  <appSettings>
    <!-- Laserfiche server login information -->
    <add key='server' value='PENDINGIMAGE' />
    <add key='repository' value='UNFILEDSEARCHING' />
    <add key='username' value='tops' />
    <add key='password' value='top.password' />
    <!-- Polling interval in milliseconds -->
    <!-- to test set to 5000 (5 seconds), set back to 60000 for production' /> -->
    <add key='interval' value='60000' />
    <!-- Maximum number of documents to process in a batch -->
    <add key='maximumdocs' value='1000' />
    <!-- Name of Template Field Key to set status of TOPS lookup -->
    <add key='templatefieldstatus' value='TOPS Status' />
    <!-- File for XML to Template Field Mapping -->
    <add key='fieldmapping' value='C:\Program Files\Laserfiche\URT TOPS Lookup Service\FieldMapping.txt' />
    <!-- TOCID of "Pending Driver Invoices" and "Pending Storage Reports" and "Pending Supporting Docs" saved in this file -->
    <add key='folderqueuefile' value='C:\Program Files\Laserfiche\URT TOPS Lookup Service\FolderQueueFile.txt' />
    <!-- File for List of Template Field Keys to lookup into TOPS -->
    <add key='templatefieldkeysfile' value='C:\Program Files\Laserfiche\URT TOPS Lookup Service\KeyFields.txt' />
    <!-- Post URL -->
    <add key='posturl' value='http://secure.towexchange.net/apps/Laserfiche/FindCallXML.php?CompanyInfo=X60C0E0756A11C30C090890E&srp;' />
    <!-- Post Invoice Num = 148081 -->
    <!-- Escape char for "&" to "&amp;" -->
    <!-- Error Log File -->
    <add key='errorlogfile' value='c:\temp\laserfiche\tops\service.log' />
    <!-- SMTP server and return address for email notifications -->
    <add key='smtp' value='v-exchange.laserfiche.com' />
    <add key='returnaddress' value='notification@ltopservice.com' />
    <!-- to debug, set true or false -->
    <add key='debug' value='false' />
    <add key='ClientSettingsProvider.serviceurl' value='' />
  </appSettings>
  <system.web>
    <membership defaultProvider='ClientAuthenticationMembershipProvider'>
      <providers>
        <add name='ClientAuthenticationMembershipProvider' type='System.Web.ClientServices.Providers.ClientFormsAuthenticationMembershipProvider, System.Web.I' />
      </providers>
    </membership>
    <roleManager defaultProvider='ClientRoleProvider' enabled='true'>
      <providers>
        <add name='ClientRoleProvider' type='System.Web.ClientServices.Providers.ClientRoleProvider, System.Web.Extensions, Version=2.5.3.0, Culture=neutral, ' />
      </providers>
    </roleManager>
  </system.web>
</configuration>
```

URS Southwest, Inc.
Vehicle Storage and Inspection Report

Law Enforcement Information
 Please answer the following questions. If YES, have officer initial appropriate "Yes" box.

Is this tow an owner's request? Yes No
 Is the vehicle owner or operator request this towing company? Yes No
 Is this a special situation? Yes

Canal Swimming Pool 4x4 Rollover
 River Bottom Desert Barrier Cable Other _____

Year _____ Make _____ Model _____ Style _____
 Color _____ License # _____ State _____ Lic. Yr. _____
 Towing Company Name _____ Storage Yard Address _____
 Vin # _____ Odometer _____

Remarks _____
 Is this a "DOC-05"? Yes

If there is a Police Hold, please write the agency report number and the phone number to call to get the hold released.
 30 Day Hold AFB-25-2611 Yes No Boot and Tow Yes No POC 23-85 Yes No
 Agency Report # _____ Phone # _____
 Is this Tow to be billed to the Public Agency ordering the tow? Yes No Date of Correct WPN Vehicle _____
 Signature & Receipt Number _____

Called By: DDT Date: 11/18/11 Time In: 12:00
 Staircase Damage 4th Street Other _____ Keys Y N
 All Both Front Rear _____ Ratio Y N **Released!**

Pick Up Location: 1219 S McClintock
 Towed Mileage: _____ Flat Bed Wheel Lift Front Rear

Recovery Time _____
 Have you documented damage? Yes No
 Driver's Name: ABEL Owner # 32 Truck # 2113
 Driver Signature: _____

Why Tow Impersonation / Special Tow / Damage? DDT
VIN# 1GKKE63U76J164113 op GMC Yukon 4 Door
BACK PLATE # AET6694-12-12 AZ

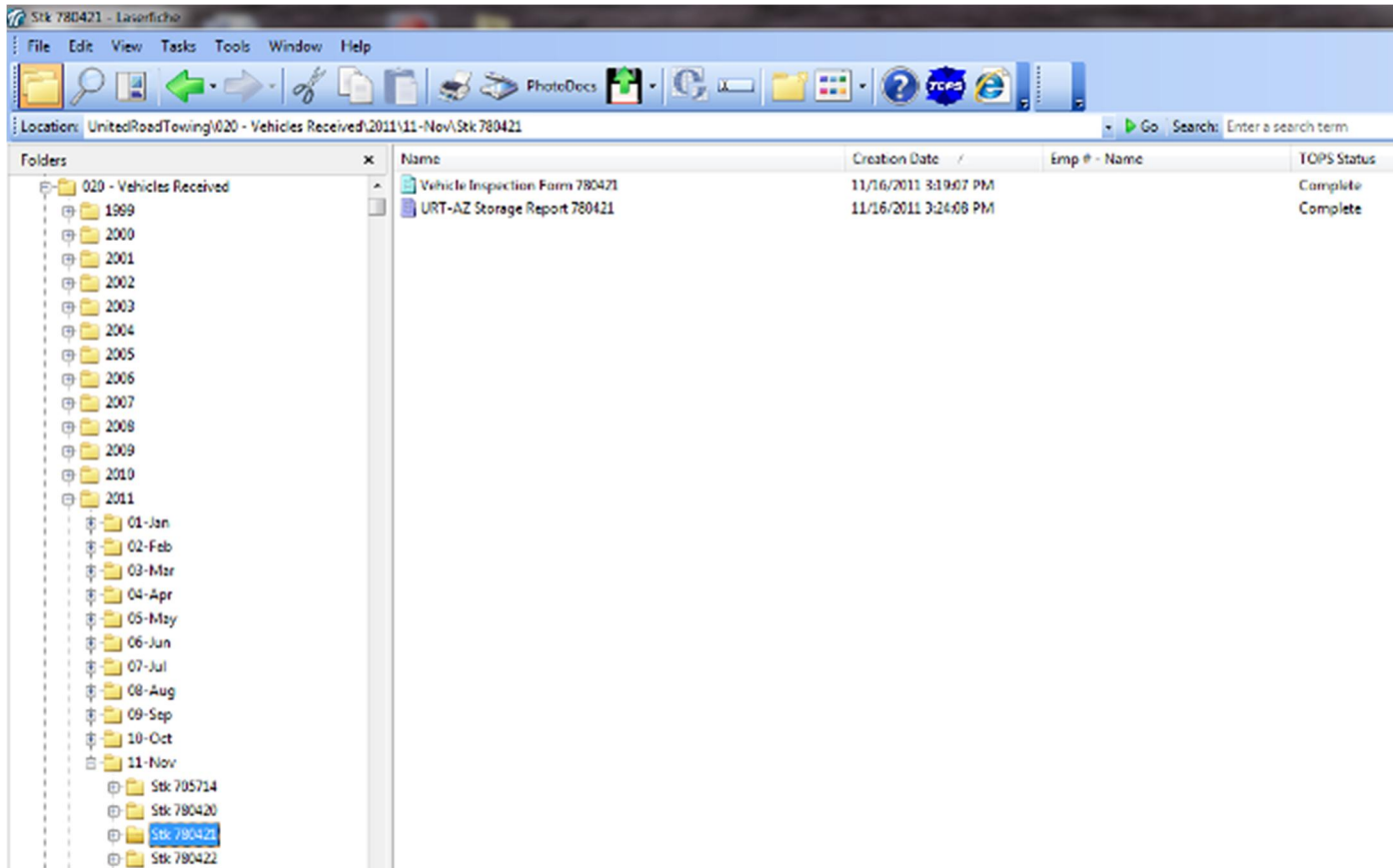
Metadata

Fields Tags Links Versions

Template: Storage Report

Stock # 806499
 Customer: Urban Commuter PP1
 Tow Date / Time: 11/18/2011 11:50:28 PM
 Requesting Party: Patrol
 VIN: 1GKKE63U76J164113
 License Plate State: AZ
 License Plate #: _____
 Vehicle Color: Black
 Vehicle Make: GMC
 Vehicle Model: Yukon
 Vehicle Year: 2006
 Driver #: 32
 Driver Name: Abel Rodarte
 Truck #: 2113
 Document: URT-AZ Vehicle Storage Report
 SourceDoc: _____

When all fields are complete, the Workflow session electronically files the documents by tow date:



“Now anyone who answers the phone can answer inquiries about the status of a vehicle by doing a simple search in Laserfiche.” — Sheila Gallegos, Project Manager.

Tips and Lessons Learned:

- Involve everyone who touches the documents to be sure that you don’t miss something critical to the department. Find out what is important to them.
- Add quality checks to the system for those odd situations that might need to be processed differently.
- Document the current business processes and determine where Laserfiche can create efficiencies. Then set measurable and realistic goals as to when the efficiencies can be implemented.
- Think outside of the box.

Some of the products and services listed on the Laserfiche Solution Exchange were not developed by Laserfiche. The recommendations and opinions expressed on the Laserfiche Solution Exchange are those of the person or persons posting the recommendations only, and they do not necessarily represent Laserfiche's opinion or recommendation of the product or service being reviewed. Laserfiche disclaims all liability resulting from your purchase or use of any non-Laserfiche software product or service listed on the site.