

## City Clerk's Office Procedure for Saving Records Into Laserfiche

### 1. Procedure

#### *Preparation*

Identify the following information before beginning:

- The repository or department file plan to receive the Records
- The appropriate record category
- The required metadata, as well as any optional metadata, for the record category you will be using

If you are unsure about the repository or file plan, the record category, or what metadata is required, contact the City Clerk's office for assistance before beginning.

#### **A. Preparing Paper Records for Scanning:**

- i) Prepare documents (i.e., correct stacking order, remove staples / paperclips / post-it notes, make sure pages are facing all the same way, etc.).
- ii) Scan one type of document at a time (e.g., all Resolutions, all Ordinances, all Minutes, etc.). Scan all documents as Multipage TIFF images.
- iii) If scanning in multiple Records of the same type at the same time, they will need to be split apart; follow the document separation procedure for the scanner you will be using.
- iv) Before moving to the next step perform quality checks to be certain all pages have scanned correctly; rescan any Records that do not meet quality assurance criteria; ensure both sides of two-sided documents are scanned.
- v) Direct your scanner to scan to the appropriate department folder in the EDMSScans network folder. Both desktop scanners and the City copiers can be set to send scans to this folder.
- vi) Once all documents are scanned and quality checked, move to the next step, Importing Records into Laserfiche.

#### **B. Importing Records into Laserfiche:**

- i) Open the Laserfiche Desktop Client. It is much easier to use for importing than the web client. You must be logged into the Laserfiche repository and file plan into which you want to import the record.
- ii) From the EDMSScans folder, drag the document(s) you want to import into the "Incoming" folder. Choose the appropriate template, then click "ok." The metadata fields for that template will appear.

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- iii) Enter values for required metadata fields; enter values in optional fields, if needed.
- iv) Click "ok." The document will then be sent to its assigned folder.
- v) Confirm all pages have been received and metadata is correct.
- vi) Delete imported scans from the EDMScans folder after all quality checks have been performed.