

Tompkins County Laserfiche User Group Meeting Minutes (TSSERR)

October 27, 2015

Meeting Location: Village of Cayuga Heights Offices

Present: See Attached Sign-In Sheet

Special Guests: Liz Mistretta and Brian Hoody from General Code

Welcome and Introductions:

Tompkins County Clerk Reynolds welcomed everyone to the meeting, and then introductions were made by everyone. Ms. Reynolds reported that the County has been awarded their 4th grant to scan town and county court records into Laserfiche. At this point, the towns of Ithaca, Lansing, and Ulysses are very interested in starting that project.

Tips and Tricks for Laserfiche Use:

Ms. Mistretta informed everyone that Tompkins County has purchased Laserfiche's "Training Center Module". It contains about 200 snippet videos on many topics that will be of interest to everyone in our group. It should be up and running by December 1, 2015, and she will send an e-mail to everyone in our group to let them know when it is available for use. She will also provide everyone with passwords and login information. She explained how the "Training Center Module" works as she demonstrated the site for everyone. The site will keep a list of all the courses that you've taken, and the videos are each about 5 minutes long and accessible anywhere and anytime.

In the meantime, she encouraged everyone to also visit Laserfiche's Website and their training center. It has a lot of very useful information and can be used as another resource as we work more and more with Laserfiche. Laserfiche Version 10 will be launched in 6-8 weeks; the Laserfiche "Training Center Module" will help users learn how to use the different tools available. The online training tools are very helpful, especially to new users.

Mr. Hoody provided a brief overview of Laserfiche so everyone could see the basics of it. He confirmed that TIF format is the best format for documents being kept in Laserfiche. Laserfiche will handle PDF's but he cautioned that not all pdf's are created equally so they may have trouble ocr'ing; if that happens, use Laserfiche Snapshot to create the document in tif format. He stated that Snapshot can also convert Word or other formats into tif documents. He did note that OCR is not perfect and has problems with signatures, and some older documents. In those instances, he recommended that if these older documents are commonly accessed to use the "Sticky Note" tool to put in identifying information on the document which will help with searches in the future. He explained that "Dynamic Indexing" makes scanning consistent and naming consistent by the use an index for each piece of information required in a template (i.e. a drop down menu to choose what information a field should contain). This is a good tool when there is scanning being done by multiple people and you want folders and information in them to have a consistent naming convention.

Mr. Hoody provided the following tips when scanning documents:

Choose “rotate” as one of the tools when scanning so that blank pages are not scanned and it will automatically rotate documents that are upside down.

You can also choose how to ocr documents - i.e. very old or typewritten documents you would want to choose “accuracy”; for most other documents “standard” should be fine, and will enable scanning to go faster.

Each task you ask Laserfiche to do will slow down the scanning time so it can take care of them.

OCR'ing should be the last task done last when scanning

Searching Tips:

Sticky notes and text boxes are searchable.

Date range search: if you want to find something done within the last two weeks or within a particular folder when you know what decade or year the information should be in, it will save time because Laserfiche will not have to search through the entire repository.

If searches for certain documents are performed routinely - set up criteria for those searches and then save them so you don't have to enter the same criteria every time a search is done.

The words “and” and “or” can be used in searches; that means you could put two different words into the search criteria and Laserfiche will search for those two words to find the record.

The “Fuzzy” search is a good tool to use when words are misspelled; try it and see what happens and then turn it off if you're not going to use it.

“Wild Cards” for searches will find all words that contain those particular letters (i.e. wat* fill in the blanks) and Laserfiche will search to find all the words that contain those letters. “Wild Cards” can be used for index and field searching.

Records Management:

Ms. Mistretta stated that General Code has taken the New York State Archives Record and Retention Schedule MU-1 and imported it into Laserfiche for the “Records Management Module” to use. That way all the common record series are listed so when records are placed in Laserfiche, the appropriate record series can be chosen, which will then pull up the information needed to set up the appropriate retention for the record. The dates can be modified based on individual municipality's needs.

The “Quick Fields” module of Laserfiche can be used to take a batch of documents and scan them into Laserfiche as separate documents. Laserfiche workflow will grab the document from the trigger which is located in the index field to sort the record accordingly.

Compliance Reports:

This is a tool that can be used for employees who need to complete certain tests or trainings annually. Laserfiche will keep track of the certification dates and provide a report to the clerk about which employee(s) certificate has expired so that recertification or testing can be scheduled. In addition, different compliance requirements can be set up so that once a year an e-mail can be sent to the employee that needs to be re-certified, the link takes them to where the test is located, they take the test and submit it, then it goes back into the repository and into the tracking system until recertification needs to be completed again.

That tool is found in "Laserfiche Forms" which will interface with a repository, pull out indexing information so an administrator can create a new compliance type anytime. It will also keep sending e-mails to the employee until they take test; after a certain number of reminders it will send an e-mail to the appropriate supervisor.

The latest version of Laserfiche (10) is a tool for interconnecting to information - i.e. it can pull information from a database and plug it into an index. It will also be able to interface with GIS applications by clicking on a GIS map, and pull all the information on that property up for the users' information. In addition, Quick Fields and Work Flows will be able to be launched from the web, and will be much easier for the IT Administrators who oversee and provide support for Laserfiche users.

Ms. Reynolds reported that Tompkins County is almost ready to launch a FOIL workflow (very similar to the one that the City of Ithaca developed); right now, it is being tested by the sheriff and county administrator's offices. The County will be ready to assist outlying towns and villages with setting up the FOIL Workflow for their use upon request, once theirs is officially launched. She stated that Tompkins County is also working on incident reports, reviewing all forms and trying to get them all into Laserfiche Forms as well.

In addition, the Tompkins County Personnel Department is about to do an onboarding process through Laserfiche. Once an employee is hired, Laserfiche launches a workflow of required forms that need to be completed, information needed for the employee, and forwards requests to appropriate departments to respond to.

City of Ithaca Clerk Holcomb reported that the City has done more with public based forms and developing workflows to make it easier for the public to submit online applications or requests, such as FOIL, Special Event Applications, Noise Permit Applications, and most recently Commons Use Applications. Since the implementation of these workflows, the City of Ithaca has processed 850 FOIL requests, 43 Special Event requests, and 221 Noise Permit requests. The automated workflows have helped to reduce staff time greatly, although there are still problems with some users using them, but with time those issues should be resolved. The City of Ithaca was able to work with a historic preservation specialist who scanned all of 1893 and 1899 Crandall Maps of the City of Ithaca. These maps are now in Laserfiche, and are a great resource that can be easily accessed electronically and with ease from ones desk. In addition, the City hopes to make its cemetery records available to the public in the near future through

Laserfiche. The City of Ithaca has 33 advisory boards/committees which the Clerk's Office maintains appointment and term information, it would be interesting to see if there is a Laserfiche tool that could be used to make the process more efficient for both City staff, and the applicants or board members. Ms. Mistretta responded that General Code would be able to help with the advisory board needs of the City of Ithaca, and would be reaching out to City staff to set up a meeting.

Tompkins County Clerk Reynolds reported that the County has already put its court records into Laserfiche, and the judges love it. The Tompkins County Clerk's staff will be assisting the County District Attorney's office transition to the use of Laserfiche from their 20 year old system. They plan to move on next to individual police agencies to upload incident reports to Laserfiche which will enable the District Attorney's Office to look at, and import the information into the programs they use by making a notation in Laserfiche.

Tompkins County Clerk Reynolds stated that Laserfiche has gone through intensive review by the Office for Court Administration, and NYS Archives is supportive of Laserfiche and its record storage capabilities. She stated that Tompkins County scans the documents, and then the hard copy is destroyed. The County's IT network system is backed up all the time and is also stored offsite in multiple locations. It is a great resource for record storage, and actually safer than keeping records on different municipality servers.

Tompkins County Clerk Reynolds further reported that staff from the County's IT Department has been working with Tompkins County Environmental Health to develop a program in Laserfiche that will assist them in the issuance of temporary food permits.

Tompkins County Clerk Reynolds announced that staff from the Town of Caroline, Village of Cayuga Heights, Town of Ulysses, and the City of Ithaca will be going to California in January for the Laserfiche Empower Conference, which is a great training and networking opportunity for everyone. She encouraged everyone to think about attending a conference in the future, California is a great place to visit in January!

County IT Director Potter responded a question regarding audio records and Laserfiche. He cautioned everyone to be careful with both audio and video files (i.e. from body cameras) because of their sensitive nature and retention of the records in Laserfiche. He asked that he be contacted directly if a municipality has need for audio and/or video storage and the County IT Department will work with them on those requests.

Tompkins County Clerk Reynolds informed everyone that the Tompkins County Clerk's Office has a new large format scanner for maps, which is available for anyone to use anytime.

Tompkins County Clerk Reynolds thanked everyone for coming to the meeting today, and expressed special thanks to Ms. Mistretta and Mr. Hoody from General Code for attending the meeting and providing very useful information for users of Laserfiche. The demonstration of Laserfiche, as well as the tips and tricks for its use and upcoming tools in the latest version of Laserfiche (10) was very helpful to everyone.

The meeting adjourned at 11:45 a.m.

Minutes Respectfully Submitted by
Sarah L. Myers,
Information Management Specialist for the City of Ithaca
November 18, 2015

TSSERR Sign In Date October 27th, 2015

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