RECORDS MANAGEMENT PROJECT

The Records Management Project will outline the steps and processes involved in decreasing the amount of paper documents maintained by city staff, consolidate digital records maintained on the server, establish a digital storage solution for permanent and semi-permanent city records and ultimately produce a Records Management Manual for staff reference. Each step in the project contains specific goals and will include communication to staff involved in critical steps. The timeline for the project is flexible with a tentative completion date of September 2022.

Scanned documents will be stored in the City Secretary server folder titled "Records Management Project" and will be accessible to staff. Scanning documents to this secure folder will allow for better management of scanned documents and will aid in the ease of consolidation. Scanned documents will maintain a uniform naming convention which can be adjusted once the documents are transferred to the department or individual responsible for maintaining the respective documents.

Project Team: Andrea Cunningham, City Secretary

Sherry Canady, Records Management Clerk

Sarah Pevehouse, Records Management Assistant

STEP 1 – SCAN

Step 1 of the project will involve the scanning of all paper documents contained within the common areas of the building. These areas include the main hallway, records stored in former records room now occupied by Emergency Management and Information Technology, and documents stored in the open area of the council chambers.

GOALS

- *Goal 1:* removal of paper records from common areas and create more works space for staff
- *Goal 2:* scan all paper records maintained in common areas and prepare for migration to departments/staff

STEP 2 – CONSOLIDATION, STAFF REVIEW & DESTRUCTION

Step 2 of the project will involve consolidation of digital files maintained on the server, which will be reviewed by staff for documents/files requiring destruction. The project team will work with staff to migrate scanned files to their designated department folder and provide destruction schedules for staff reference.

GOALS

- *Goal 1:* consolidate top-level server file folders and create a file structure that aligns with departments and/or key functions of specific staff.
- *Goal 2:* review and consolidate scanned files, and migrate department records to departmental folders
- *Goal 3:* destroy documents/files that are past retention date and prepare documents for transfer to Laserfiche

TOP LEVEL SERVER FILE FOLDERS – GOAL 1

Currently there are over 70 top-level server folders contained on the main server. The project team will meet with City Administration to consolidate these folders into either departmental folders or specific activities folders. Upon approval of top-level folders, the project team will consolidate the server file folders as directed. Additionally, there are miscellaneous documents not stored in top-level folders that will need to be migrated. The project team will review these documents and migrate accordingly.

REVIEW, CONSOLIDATION AND MIGRATION OF SCANNED DOCUMENTS – GOAL 2

Designated department staff will be responsible for reviewing scanned documents and merging scanned files with current stored files. The project team will make every attempt to properly label folders containing scanned files and will work with staff on migration preference. This step will involve meeting with staff and developing a workable timeline for migration of the departmental files.

DOCUMENT DESTRUCTION & PREPARATION FOR LASERFICHE – GOAL 3

Staff will be provided a retention schedule which they will use to determine the destruction of documents. The project team will train staff on the destruction process and use of the retention schedule. Staff will work with the project team to devise conventional file names which will be used for storage in Laserfiche.

STEP 3 – LASERFICHE MIGRATION

Step 3 will involve the migration of records from the server to Laserfiche. The project team will be responsible for migrating prepared records to Laserfiche and entering metadata for each record. The city will be upgrading Laserfiche to the cloud and the City Secretary will work with the IT Coordinator and Administration on setting up the Laserfiche file structure.

GOALS

- *Goal 1:* create and maintain permanent document storage independent of the server
- *Goal 2:* Laserfiche training

STEP 4 – RECORDS MANAGEMENT MANUAL

Step 4 is the culmination of Steps 1 – 3 and is the ultimate goal of the project, which is to create a cohesive and comprehensive guide for city staff regarding the storage, retention, and destruction of city documents. The project team will create a draft manual for City Administration review and provide feedback. The manual will include the following:

- Overview of government document requirements according to state law
- Departmental retention and destruction schedules
- Procedures and best practices for:
  - Server file storage
  - Laserfiche file storage
  - Document destruction

PROJECT TIMELINE

June 2022 - August 2022

Step 1 - Scanning Documents

August 2022 - September 2022

Step 2 - Migration

September 2022 - January 2023

Step 3 - Permanent Document Storage

August 2022 - September 2022

Step 4 - Create and Distribute Records Management Manual