# STAFF REPORT

**SUBJECT:**        City Secretary Records Management Update

**DEPARTMENT:**    Administration

**STAFF CONTACT:**  Sarah Lockenour, City Secretary

## BACKGROUND:

When the Deputy City Secretary position was requested and considered, digitizing records was the primary goal for that position. In the Records Management Plan submitted to Council, organizing and effective use of our current storage system, Laserfiche, was one of the first projects.

I wanted to start with the Laserfiche piece of the project, because putting more records into a system that is not well organized or fully used would only create more work in the long run.  In learning about Laserfiche and what the system can do, we discovered we have training hours that are prepaid for. We have been using those hours to have bi-monthly meetings with a consultant who is helping us set up the templates and workflows necessary to have more efficient use of the system.

**Cemetery Records –**
We worked with Paul Pausewang Cemetery Manager to ensure that all cemetery records across Laserfiche, Incode 9, and the cemeteries themselves match.  This was our first folder to clean up in Laserfiche because these records are permanent, and it is important that we are able to locate information correctly for future lot sales and burials and most importantly past burials.
Laserfiche – (the document repository) now has 2205 records for the cemeteries including West End, East End, and Mount Olive. When we started this was easily doubled due to the amount of duplicate and/or incorrect entries. All records now have updated metadata that makes the documents searchable by owner name, location, date of deed or occupant name.
Incode 9 – (the main database) has about 5000 records. This system has a record for each burial or lot sold at the cemeteries.
We have hired a work-study intern through Tarleton to help with updating the online cemetery maps and our online burial list.
**City Council Minute Records-**
Cleaned up (renamed, removed/combined duplicate documents, added metadata to each record for searchability – meeting type and date) approx. 2000 files
**Ordinances and Resolutions-**
Cleaned up (renamed, removed/combined duplicate documents, added metadata to each record for searchability – document type, description, date). We found several that were approved but not signed or that were signed but printed with the incorrect date. Once we confirmed the approvals through the minutes and confirmed with Randy, those were reprinted and resigned so they are correct. Approx 1086 Ordinances and 486 Resolutions.
Once Minutes, Ordinances and Resolutions were cleaned up appropriately, we were able to automate a process that will link those documents together which greatly increases the ease of finding related documents. This is

usable on the back-end side but also usable on the website side, making related documents easier for citizens to find and refer back to.

**TABC Records –**
Organized all TABC records and created a tracking process for expiration/renewal of licenses so we can invoice for local fees.
Added metadata to each record (241 documents, about 74 active licenses)

**Property Records -**
Organized with metadata, all property records that the City Secretary's office has including deeds, easements, annexation records, liens, etc – about 3500 documents. Before we began working in this repository, there were many duplicate copies of documents and incomplete records.

There are other smaller repositories that we have worked with just in City Secretary records for a total number of documents currently in the Laserfiche repository of about 11,200 records processed since November 2023. By adding the metadata to each record, we are now, and more importantly future users, can find documents quickly and more efficiently. We have set up workflows and templates, so documents added in the future are stored correctly and in a way that is usable.  Part of this process was also reviewing our locally stored documents to evaluate what was not currently in Laserfiche and what documents should be moved over. If we plan to be fully digitized, all records with a retention longer than 'administratively valuable' need to be kept on our shared drives as well as Laserfiche.

## NEXT STEPS:

In the Laserfiche repository, there are about 130,000 more records for the other city departments. We plan to finish the City Secretary repository in March and begin meeting with our first department to start this same process that we worked through on the City Secretary files.

We plan to start with the Development Services records. In Laserfiche, they have about 10,000 files. On the shared drive, they have about 86,000 files – some of which may be in Laserfiche already or may not need to be, but we will need to work through them to confirm.  The anticipated completion date of the Development Services records would be mid-summer.

During this time, we will also work on Administrative Services (airport, main street, tourism) records. These three departments currently do not have any Laserfiche repositories. Their shared drives have about 8,000 records to work through. The anticipated completion date of this portion of Administrative Services would be mid-summer.