HIGHLAND
COUNTY • OHIO
RECORDS CENTER & ARCHIVES

RECORDS MANAGEMENT MANUAL
A GUIDE FOR EMPLOYEES

Control + Click to advance to a specific page.

INTRODUCTION

This manual establishes standards and procedures to streamline records management County-wide.

We wish to create an accurate and complete documentation of policies and transactions of the Highland County Government. Simplification of records creation, maintenance, and transfer will enhance transparency. Public records are available for review by constituents. Every office has current retention schedules and timely disposal of records, compliant with local, state, and federal laws. Preservation of historic and permanent records is prioritized.

What the Record Center does

The diagram shows overlapping circles representing the functions of the Record Center:

- TECHNICAL ASSISTANCE / TRAINING
- RECORD REQUESTS / REFERENCE SERVICES
- POLICY & PROCEDURE
- REPOSITORY FOR NON-CURRENT RECORDS / PRESERVATION / CATALOGING & INDEXING
- LEGAL COMPLIANCE
- RC-2 UPDATES / SUBMITS TO RECORDS COMMISSION, STATE ARCHIVES, & AUDITOR OF STATE
- DESTRUCTION REPORTING / DESTROY PER RETENTION SCHEDULE / PROVIDES DESTRUCTION DOCUMENTATION

Overview of Record Management

The Ohio Public Records Act (ORC 149.43), or Sunshine Law, regulates the availability of government records, how records are maintained, and how long they are preserved. The Ohio Revised Code, Section 149.011(G) provides three criteria for what materials meet the definition of a record.

Public records must meet these criteria:

| BE IN A FIXED MEDIUM	BE PART OF A BUSINESS PROCESS	DOCUMENT FUNCTION OR POLICY	ASSIGNED RETENTION SCHEDULE	SUBJECT TO PUBLIC RECORD ACT
Stored in a fixed medium, such as paper, digital image, or an audio file.	Records are created or received during a public office's business.	Records document functions, policies, procedures, and decisions of the public office.	All records meeting the previous criteria must be placed on a retention schedule.	Documents that do not meet all three criteria are not subject to public records laws.

RC forms have been created to allow local governments a standardized way to collect and transmit information about government documents under the Public Records Law. For more information check out the Local Governments Records Manual, pages 22-29. The Records Center & Archives will complete all paperwork in cooperation with the records' originating department.

Retention Schedules (RC-2)

The basis of all record management systems is the Retention Schedule. Retention Schedules are created in collaboration between the Office Manager, the Elected Official, or their designee, and the Records Manager. Retention Schedules go through a multi-step approval process, outlined below.
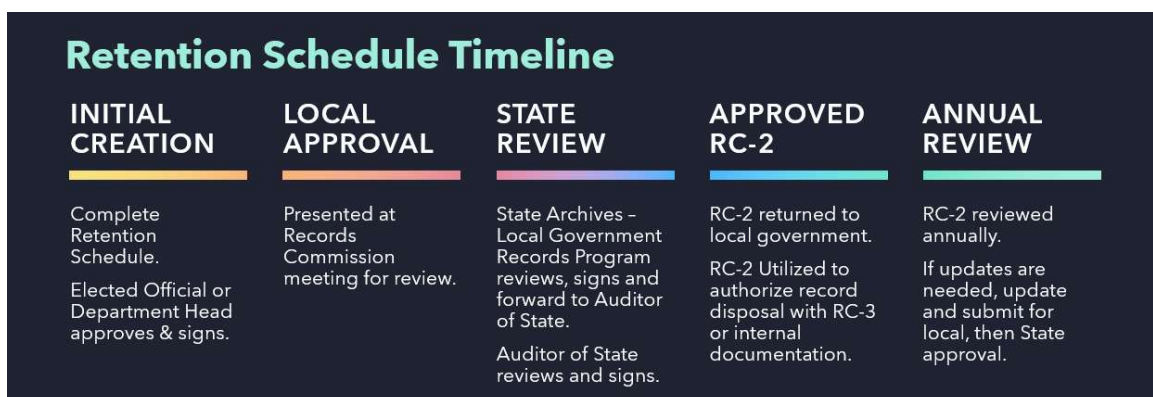
All records must be retained based on subject, regardless of form. As such, records created electronically such as email or word documents are processed identically to a handwritten turn-of-the-century bound volume.   The Retention Schedule catalogs the types of records an office produces, documents the amount of time a record should stay in the office of origination, and then designates next steps: retention in the Records Center for the time specified on the retention schedule, destruction, or transfer into Records Center's permanent collection. The RC-2 also designates which copy is the 'official' or 'copy of record' when multiple copies exist within the county.

Reading a Retention Schedule

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

Page 2 of 2

See instructions before completing this form

Highland County

(Local Government Entity)

Records Center

(Unit)

Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
RCT-001	**Daily Inspection Records** Records documenting the daily temperatures and humidity readings for record storage areas.	1 year	Paper/ Electronic		☐
RCT-002	**Disaster Preparedness Plan** Documents plans and procedures to protect and reestablish county operations in the event of a disaster. *Official Copy belongs to Emergency Management Agency.*	Until no longer of administrative use/superseded	Paper/ Electronic		☐
RCT-003	**Record Retrievals, Service Requests, Transfers** Record that documents department's/division's retrieval or	Permanent	Paper/ Electronic		☑

1
Schedule Number

These codes are an easy way to concisely label your boxed records.

2
Record Title & Description

This helps new employees and the public better understand the contents of a record type.

3
Retention Period

How long a record must be kept. Can be expressed as an interval of time, an event or action, or a combination of the two.

4
Unit

Department the retention schedule applies to. There is also a 'General' schedule of administrative records that applies to all departments.

5
Media Type

The medium in which the record is stored.

6
RC-3 Required

When checked, the State Archives – Local Government Records Program requires a Certificate of Records Disposal to be approved before destruction.

Destruction Documentation (RC-1, RC-3, & Intra-office)

Destruction documentation is required except for the destruction of blank forms or extra copies of a record.   The type of documentation is dependent on situational and legal factors outlined in the table below.

Record Destruction Documentation

ONE-TIME DISPOSAL OF OBSOLETE RECORDS (RC-1)

Documents disposal of records that are:

No longer created or maintained

OR

Are not listed on an RC-2

OR

Have been accidentally destroyed or lost to a natural disaster

CERTIFICATE OF RECORD DISPOSAL (RC-3)

Documents disposal of records that are:

Designated by the State Archives Local Government Record Program as requiring an RC-3 prior to disposal

OR

If the RC-2 predates September 29, 2011

INTRA-OFFICE DESTRUCTION DOCUMENTATION

If the RC-2 does not require destruction documentation

AND

The records were not accidentally destroyed

AND

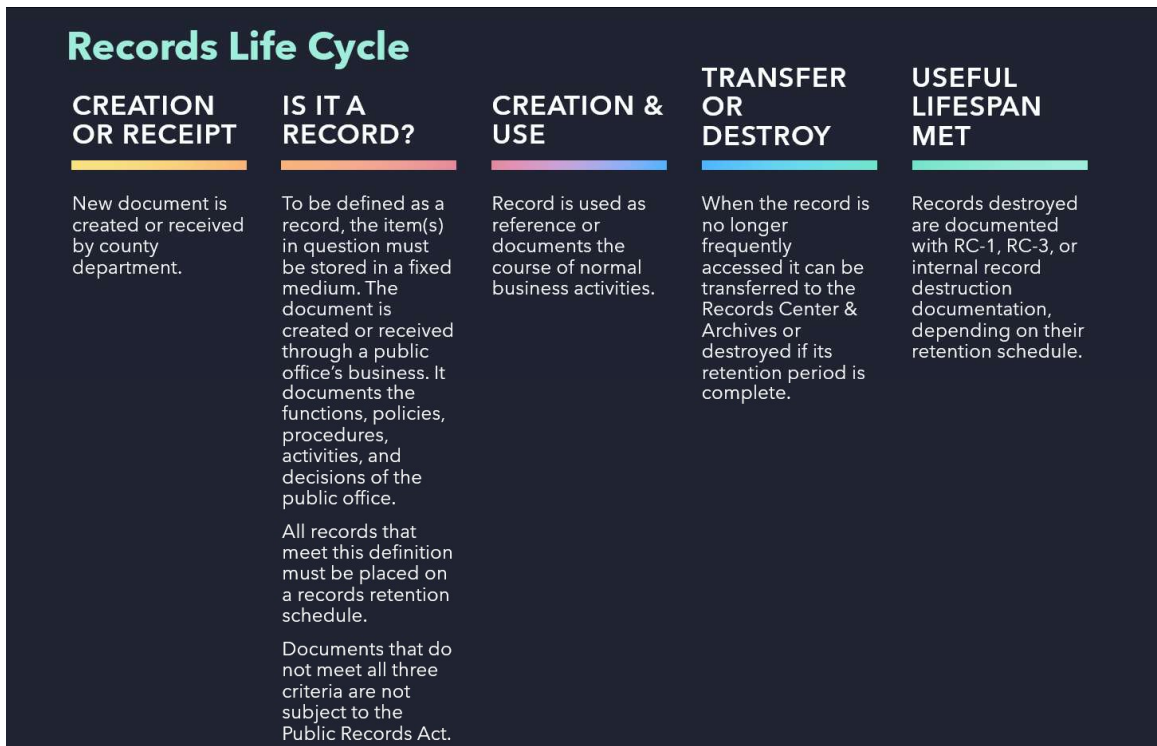The records are currently being created or used

THEN

The destruction should be documented in-house

Illegal/Accidental Record Destruction

When records are illegally destroyed, it can impose heavy administrative hindrances on the office. Losing needed records can result in not being able to fulfill essential job functions and attempting to recreate lost information on those records can result in the loss of staff time. This can negatively affect office employees, other government agencies, and the general public. The premature loss of records can also go beyond the administrative functions of an office. Records that have not gone through proper disposal could result in the loss of valuable historical information and institutional memory. If illegal records destruction is suspected, an investigation may be conducted to substantiate or dismiss the claims by local authorities, the Ohio Auditor of State's Office, and the Ohio Attorney General's Office.

In the case of natural disasters or accidental destruction please submit the **Loss or Unauthorized Destruction Form** (add link when records website complete). We must document the status of the record in case it is later requested. An RC-1 documenting the loss will be created. This is not to get you in trouble; we need to document that the records are missing so that we will not be financially liable if a request cannot be filled due to missing records.

Record Life Cycle

Records Life Cycle

CREATION OR RECEIPT

New document is created or received by county department.

IS IT A RECORD?

To be defined as a record, the item(s) in question must be stored in a fixed medium. The document is created or received through a public office's business. It documents the functions, policies, procedures, activities, and decisions of the public office.

All records that meet this definition must be placed on a records retention schedule.

Documents that do not meet all three criteria are not subject to the Public Records Act.

CREATION & USE

Record is used as reference or documents the course of normal business activities.

TRANSFER OR DESTROY

When the record is no longer frequently accessed it can be transferred to the Records Center & Archives or destroyed if its retention period is complete.

USEFUL LIFESPAN MET

Records destroyed are documented with RC-1, RC-3, or internal record destruction documentation, depending on their retention schedule.

Benefits of Record Management

We have been entrusted to identify, catalog, and retain records by the Ohio Revised Code. Transparency in government records is important for citizen trust. Many cubic feet or terabytes can be emptied by keeping records only through their retention period. Records management systems make it faster to locate records.

HANDLING

General Guidelines for boxes & books

- Damage that occurs during the course of the project is both documented and reported immediately to the Record Manager so corrective action can be taken.
- If Vendor encounters existing active mold or pest damage, it is both documented and reported.

- Vendor personnel avoid damage to County shelving, furniture, and any other property.
- Safety procedures prevent injuries to all personnel working on the project.
- The Vendor handles and transports County property in such a way that the property is secure and protected from damage from loss, fire, water, shock, vibration, heat, humidity, pests, dirt, weather hazards, theft, and all other hazards. Complete protection and care is employed to provide optimum protection for County material from the time it is removed from its current location to the time it is placed in its new location, as verified by Record Center staff.
- County property is never left unattended or in unsecured areas. Vendor personnel comply with all security requirements and regulations at work sites.
- Food, drink, and smoking are prohibited in storage areas. Vendor personnel refrain from eating, drinking (including water), or smoking except in designated areas and at all times when handling library collections. Work sites, including outdoor areas, are kept free from food waste, drink containers, and the remains of cigarettes. Dispose of all trash outside the work site.
- No adhesive labels of any kind, including Post-it®-like labels, are applied to Record Center materials. When books must be individually marked, insert paper flags into text blocks.
- Handle materials with recently cleaned hands or disposable, powder-free examination gloves (no cotton gloves).

Removing books from shelf

- Use ladders or stools to access library materials on higher shelves; do not climb or support body weight directly on library shelving.
- Freestanding bookends such as cloth-covered blocks keep books upright at all times on the original shelf; no slumping or leaning is permitted at any time.
- Remove volumes that sit upright on shelves by grasping them at mid-spine with one hand, while supporting those that remain on the shelf with the other. Gently push adjacent books back to expose gripping area. In absolutely no case shall a volume be removed from the shelf by pulling from the top of the spine.

- For thinner books, grasp no more than three books at a time and a maximum of 3" total thickness (to reduce the risk of dropping).
- Whenever possible, move library collections on rolling carts, or boxed and secured on wrapped pallets. Minimize the distance of hand-held transport to reduce risk of dropping.

Moving books

- Avoid stressing the binding or covers whenever handling a bound volume. Never force open beyond the media's normal stretch.
- Gently align detached pages individually; moving the pages as a group is likely to cause further damage.
- Keep any inserts with the volume.
- Do not place anything between the pages of bound volumes. The added thickness can strain bindings or tear pages.
- Weak or broken bindings will be wrapped and tied with cotton tape for structural support. The knot is required to be placed on the back of the book (side opposite spine) where it will not touch neighboring volumes.

Cleaning books

- Ensure that as little dust and grit as possible are transferred to new locations, and to improve the longevity and usability of the collection by reducing risks of acid migration and abrasion.
- Vacuum and/or wipe dust and other particulate matter from the outside surfaces of collection items or their containers. No liquids are to be applied to collections or their containers.
- The contract should specify the cleaning supplies, cleaning cloths, dust masks, gloves, vacuum cleaners, extension cords, and other equipment required to complete the work described herein. Any products should be archive-safe.
- Clean collections before they are moved onto carts or into boxes.

- Only use vacuum cleaners with HEPA filtration systems. Use soft bristle brush attachments at the nozzle end. Mark the brush attachments used to clean collections so they can be segregated from brushes used to clean shelving and floors.
- Prepare the vacuum cleaner: when vacuuming special collections materials, cover the vacuum wand with cheesecloth before a brush is applied, to prevent paper and loose parts of bindings from being picked up by the vacuum cleaner. Any loose parts recovered from the cheesecloth should be put in an envelope and placed in the same box or end of shelf. When vacuuming general collections library materials in good condition, as well as boxes and other enclosures, the vacuum wand and brush may be used without cheesecloth.
- For books and journals in good condition, remove items from shelves one by one and hold tightly closed with the top edge pointing down, to prevent dust and dirt from being forced between pages. Run vacuum brush along all edges of each volume. Begin at the top (at the spine) and work forward along the top and the front edge. Then begin at the bottom edge (at the spine), and work forward.
- For volumes that have been shelved flat and their covers are dusty or dirty, vacuum (good condition) or wipe (poor condition) these flat surfaces as appropriate.
- Volumes that have weak or crumbling bindings should be wiped rather than vacuumed, using lint-free, oil- and solvent-free cloths approved by Preservation Services.

Packing books into boxes

- Clean, dry, intact document cases, record storage cartons (full- and half-size) and other standard, acid-free, archival boxes and padding material are suitable for transporting and storing groups of materials.
- Maintain books in the order as found on the shelf.
- Place books in boxes either on their bottom edges (i.e., upright, as if they sat on shelves), laid flat, or positioned spine down. Never place books with the spine facing up.

- Smaller books, up to 1" less than the interior height of the box, stand on their bottom edges. Pad out the sides of the box to prevent shifting.
- Larger books, within 1" of the interior height of the box, lie down inside the box in one or two stacks. If in two stacks, book spines face each other (any other orientation can enable the pages to knife into each other during transit). Pad out the ends of the box to prevent shifting.
- Oversized volumes may be placed upright with the spine facing down, but may not lean diagonally inside the box.
- Pack volumes so they do not rub or shift when they are moved, but not so tightly that force is required to remove them from boxes. Volumes may not slump or lean. Insert padding where necessary to support volumes and stacks upright, and protect collections from abrasion and distortion.
- When the lid is placed on the box, it should not rest directly on any book. A 1" gap between the tallest book or stack should remain between the lid and the material.
- Check box handle holes for damage prior to lifting, and use one hand underneath to support loaded boxes with even slight handle damage.
- All boxes containing library collections remain in an upright position (as they sat on the shelves) when they are picked up, moved, and reshelved.
- Stack boxes no more than three high on a hand truck for transport to palletizing location. Use caution when going over thresholds, elevator gaps, and other uneven surfaces. Cover with plastic if travelling outdoors.
- Stack boxes no more than four tiers high on a pallet for transport. Pad each tier with a layer of corrugated board and staggered (bricked) to prevent boxes from toppling or being crushed. Wrap loaded pallet prior to any movement.

Loading books onto a wheeled bookshelf cart

- Use a free-standing bookend on the cart and another on the shelf to keep books upright and supported at all times.
- Maintain the order as found on the shelf.

- Load the cart from the bottom up to prevent it being top-heavy and prone to tipping.
- When ready to move the cart, secure each shelf at the front edge to prevent anything from falling out. A sheet of corrugated cardboard with an L-fold at the bottom tucked into the bottom shelf, secured with three or more elastic cords works well. (consider use of non-adhesive polyethylene closed-cell plank foam to fill gaps at front of shelf)
- Fill any partial shelves with dunnage (empty boxes) or other materials to prevent shifting during transit.
- Maintain full control of a moving cart at all times. Roll carts at a slow and careful speed, and do not allow a cart to roll unattended. Vendor personnel may never ride on carts, empty or loaded.

Reshelving at the new location

- Books that were shelved upright in their original locations are also shelved upright in their new locations unless flagged by library staff.
- When books are placed upright on shelving in their new locations, spines are aligned uniformly and set back 1-2" from the shelf edge.
- Use freestanding bookends on both the rolling cart and the new shelf to prevent books from leaning or slumping.
- Leave room for expansion at the right end of each shelf as directed by library staff.
- Secure built-in bookends once the shelf has been fully loaded.
- Shelve large or heavy volumes, especially if fragile or of high intrinsic value, flat to provide support for the text blocks and binding. Ensure the weight is evenly supported. Avoid stacking oversize bound volumes more than 8" high.

RECORD REQUESTS

Process

To request a record, simply go to the Laserfiche repository and click 'Submit Forms' (1).
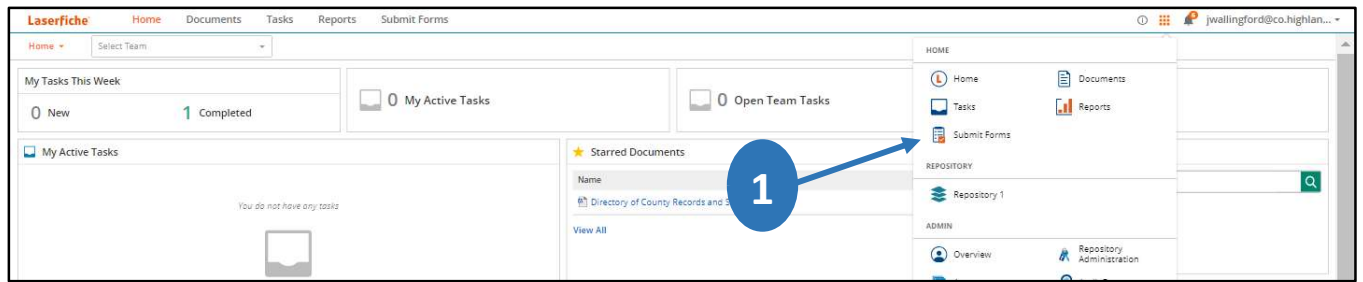
Select Internal Record Request (2).
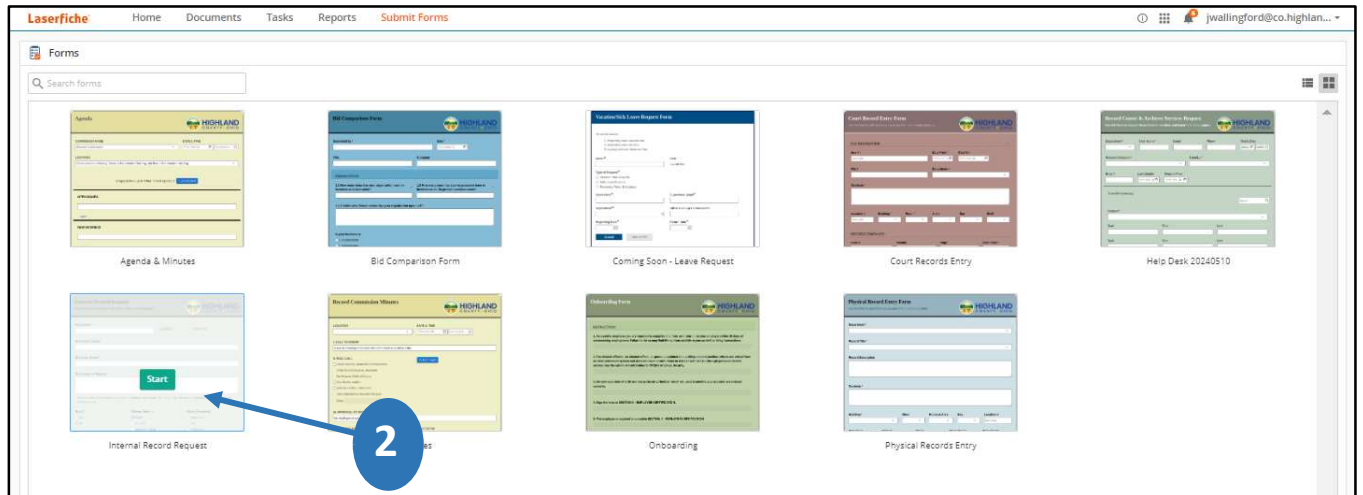
Fill out the form and click submit. You will receive a confirmation message when your submission is complete.
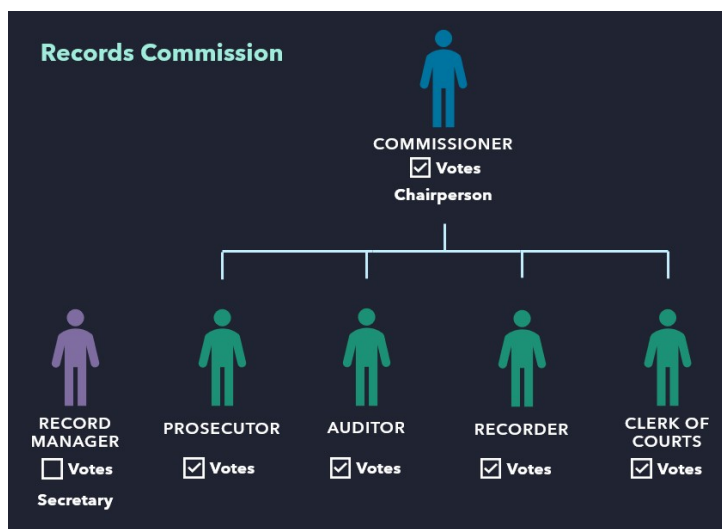
Reporting accidental release of records

Inadvertent or inappropriate disclosure of records must be reported to the Records Manager, the Originating Office and County Prosecutor. Please submit the **Inadvertent or Inappropriate Release of Records Form (add link when records website complete)**.

CERTIFIED PUBLIC RECORDS TRAINING

All elected officials or their designees are required by law to attend a Public Records Training once an elected term. The training is three hours in length and covers the Public Records Law and Open Meetings Act. The training is sponsored by the Ohio Attorney General and Ohio Auditor of State's Offices.

RECORDS COMMISSION

Our County Records Commission is part of the checks and balances system that ensures the Public Records Act is followed. The Commission reviews all retention schedule changes and one-time disposal requests before sending them to the Ohio History Connection and Auditor of State for approval. Meetings must be held at least every six months.

Imagine the Records Center as a type of library. Files will be boxed and labeled with Office Abbreviation, Schedule Number, Record Title, and Destruction Date, all from your Retention Schedule. Records with the same retention period will be combined, streamlining destruction when the document expires. Instead of the Dewey Decimal System, each box will be entered into an electronic Laserfiche repository. Each box will be given a barcode for content lookup.

Shelves have location codes to simplify discovery. The boxes are added to the shelves as space is available, meaning boxes don't have to be frequently rearranged to keep them separated by office. Random shelving offers an additional benefit of added security. This arrangement makes it very difficult for someone not trained with the software to locate a specific file.

Records software

Our Laserfiche Repository will embrace the way you create and save records, to replicate your offices' organization conventions for a seamless experience. Reports can be run to keep track of destruction dates, the movement of a record between the record center and other offices, and to track how many requests have been placed to view a certain record, to name a few. The software also allows the building of forms that enhance day-to-day business by digitizing transactions. Security classes will be made that allow a custom experience where the user can only view files from their own department, and one office can have multiple clearance levels if required. Our files live in the cloud so you can access them from anywhere with an internet connection.

Only Records Center and Archives staff may pull boxes or files for requests, with the exception of court and election records which are self-managed. To assure the confidentiality of records stored in the Records Center, records are only released to the department of origin, except for historic public records.

Responsibilities

ORIGINATING OFFICE
Subject matter experts
Record management collaborator
Manager receives notice of all record requests

DEPARTMENTAL RECORDS OFFICER
Point person

RECORDS MANAGER
Reference services
Records Storage, Preservation, & Destruction
Policies & Procedures
Record Inventory
Records Commission Secretary
Liaison between record program & Ohio agencies

How the software works

Many factors were considered when creating the records software system. Laserfiche Cloud is an online document management system, allowing you to upload, view, and work with your content using a streamlined web interface.

With Laserfiche Cloud, you can access your content wherever you go, whether from a computer or on a mobile device. Laserfiche Cloud also provides tools to ensure that your data is secure based on staff input, security concerns, legal issues, and the desire for transparent government.
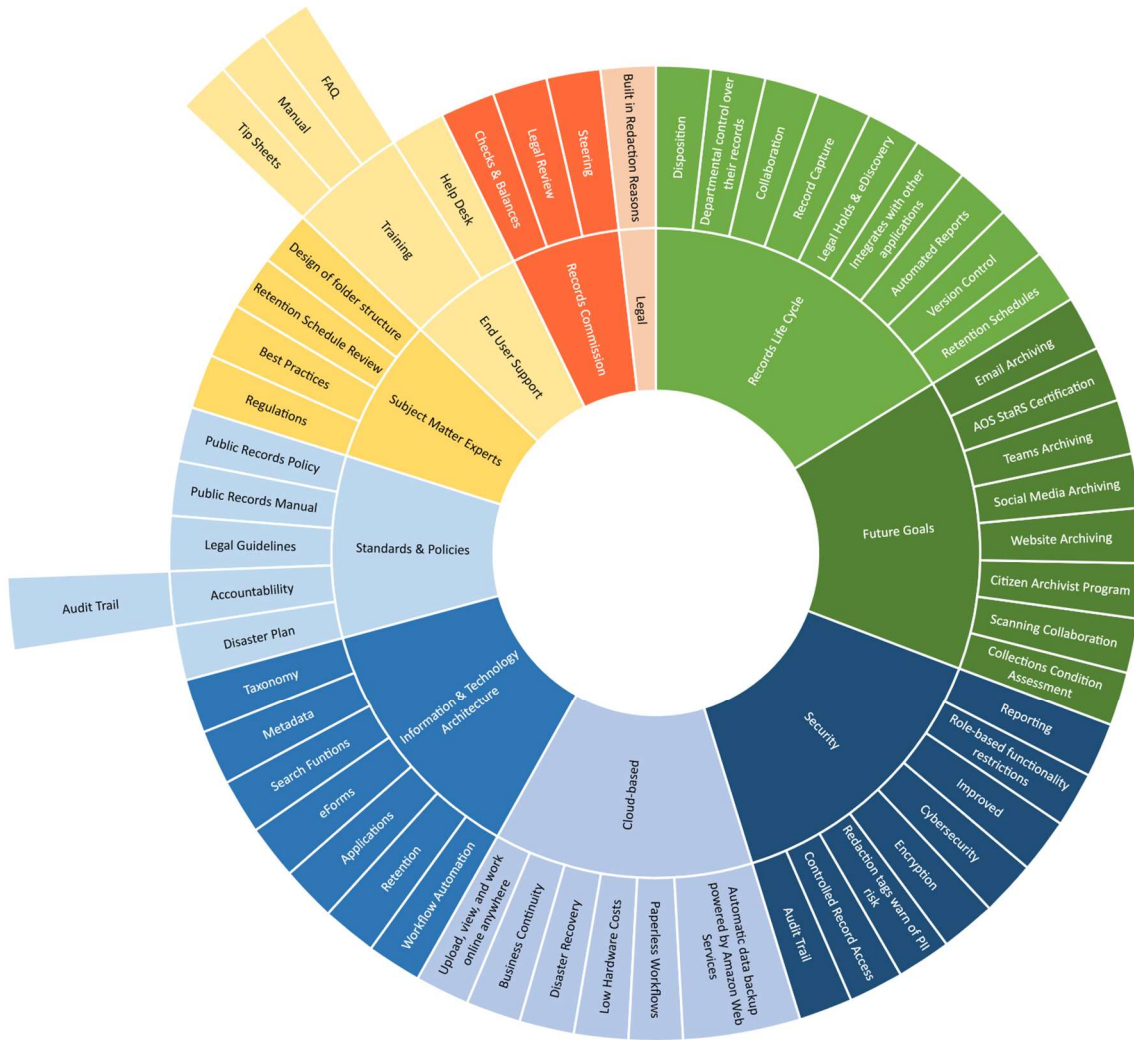
Accessing the record repository

The Laserfiche Cloud repository can be viewed using any of the following web browsers: Microsoft Edge (Chromium), Firefox, Chrome, and Safari for iOS.

Sign in here. If you select "Remember this account" you will no longer be prompted to type in the Account ID (566234393) the next time you sign in. To learn more, check out Signing into Laserfiche Cloud **(1-minute video)**. Since Laserfiche is accessed through a web browser, you can log in to your repository from anywhere and still view and work with the same repository contents and saved settings.

HOME SCREEN
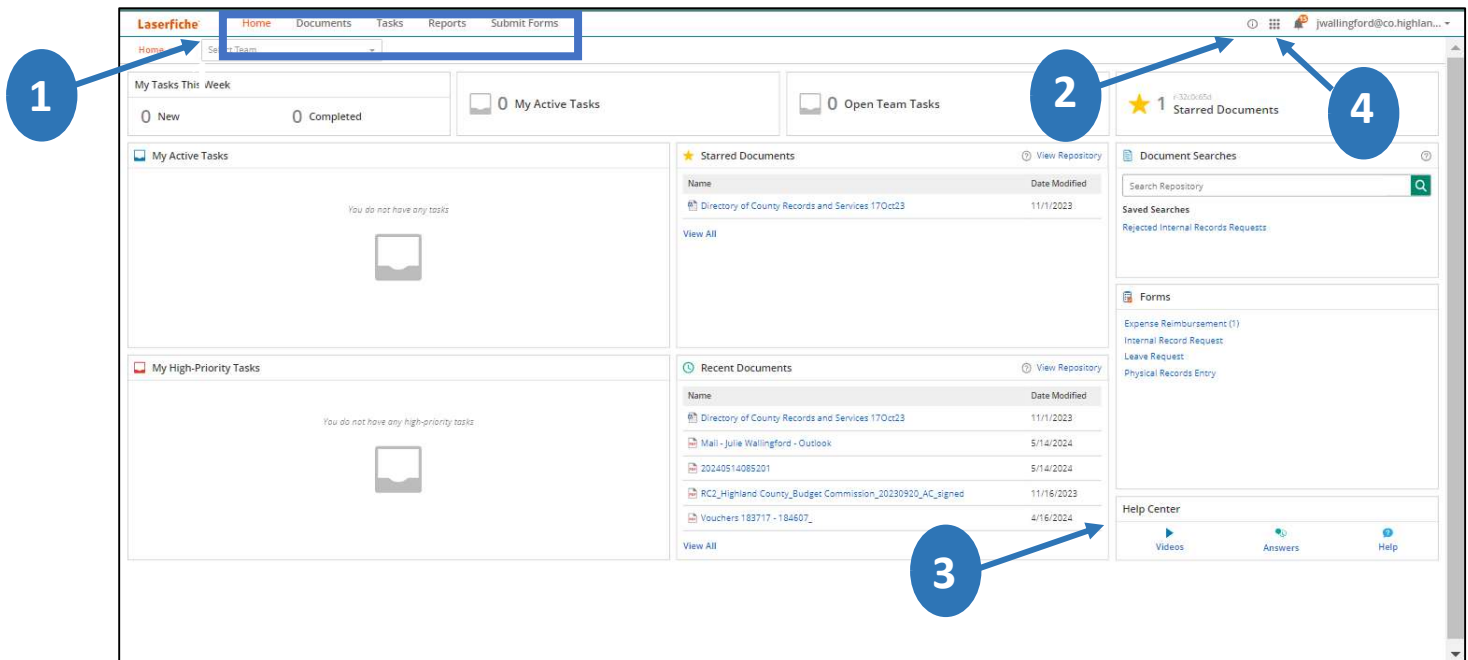
The Laserfiche home screen is a dashboard-style home page that serves as a central access point for various Laserfiche products. From the home screen, you can view important documents, high-priority tasks, key metrics, reports, and forms. The home screen is the default landing page for Laserfiche Cloud. The system will be set up to show you only public records and the files you need in your daily work.

Click on the section name to access that tab **(1)**. Widgets on each page can be customized to contain the information most relevant to you. Resources are available to the left of the app picker **(2)**. This area contains product tours, training materials, events, user groups, updates, and documentation. The bottom right widget contains the help center, with video resources and other information **(3)**.

If you are on another page in Laserfiche Cloud, you can access the home screen by clicking on the app picker in the top right corner and selecting Home **(4)**. For more information, check out Overview of the Home Screen (2-minute watch).

Customizing your Dashboard

Home: This is the landing page, containing widgets displaying key statistics, important documents, and tasks.

Documents: View summaries of favorite folder locations and starred documents, and perform searches within the repository. To customize the content, click Add **(1)** and select your department folder **(2)**, then click apply **(3)**.
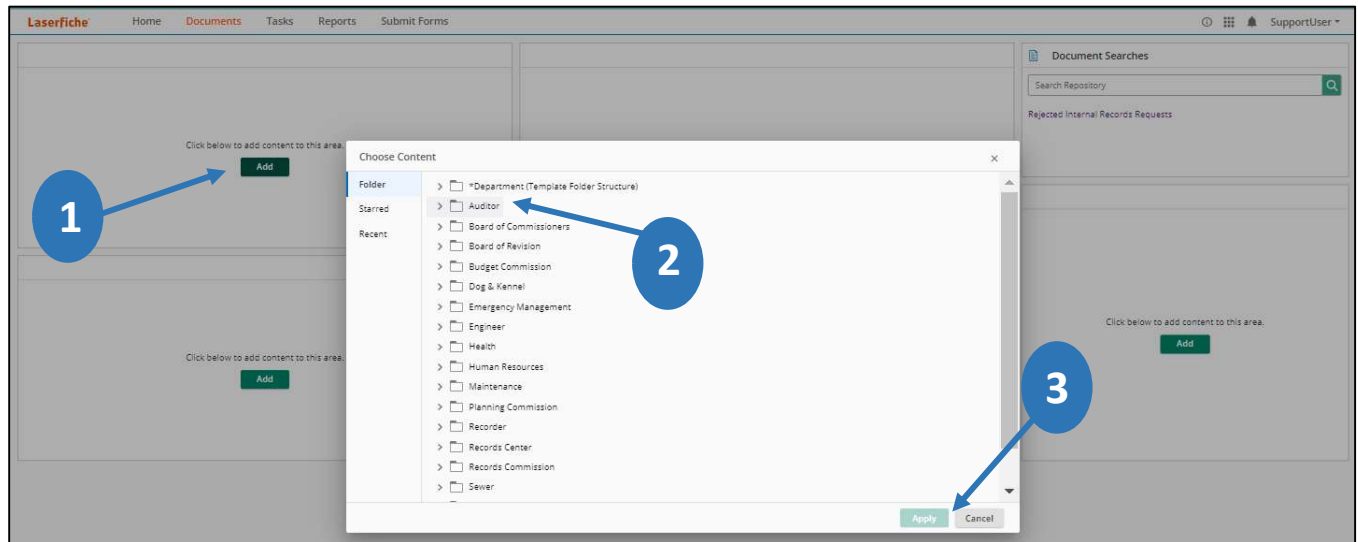

Tasks: The page for managing tasks in your business processes.

Reports: View statistics about your processes and repository.

Forms: Quickly access forms that you can submit to start a business process or request supplies and services.

File architecture

The contents of our record repository are organized into a folder tree, much like the folder tree you see in Windows Explorer. Documents are stored in folders, and folders are stored in other folders, to allow you to quickly store and retrieve relevant information. In addition, the folder tree allows administrators to easily secure even large numbers of documents. For more information, see our **File Plan**, which details each record type a department generates and the folder or subfolder where the record is saved.
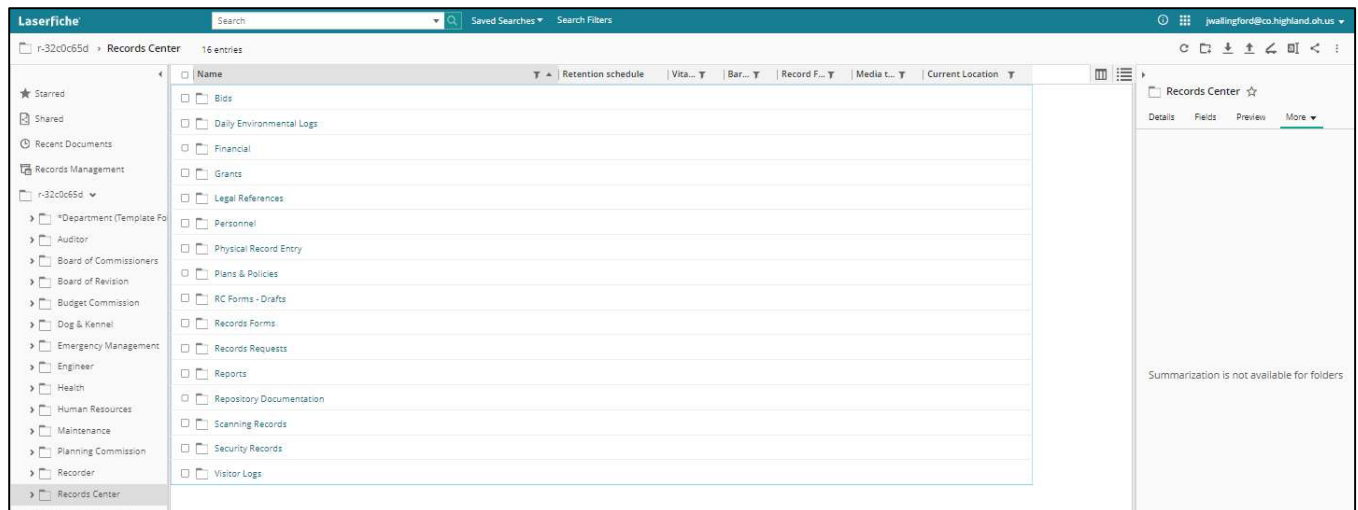
Searching for records

Laserfiche Cloud provides you with many tools for quickly locating exactly the information you need. The software includes powerful search tools to help you pinpoint the document you need. You can perform a quick search to easily find documents without additional configuration, or you can perform an advanced search to take advantage of the many search options to fine-tune your search. Once you've located a document, you can also search within that document and jump directly to the section you need.

Search Bar

The search bar lets you perform a basic search without having to open a new window or change the repository view. Enter your search term here to find documents and folders that contain that term. You can also limit your search to a specific folder, look for entries that were modified or created in a certain time period, and narrow the search to entries with a particular template or specific field values.
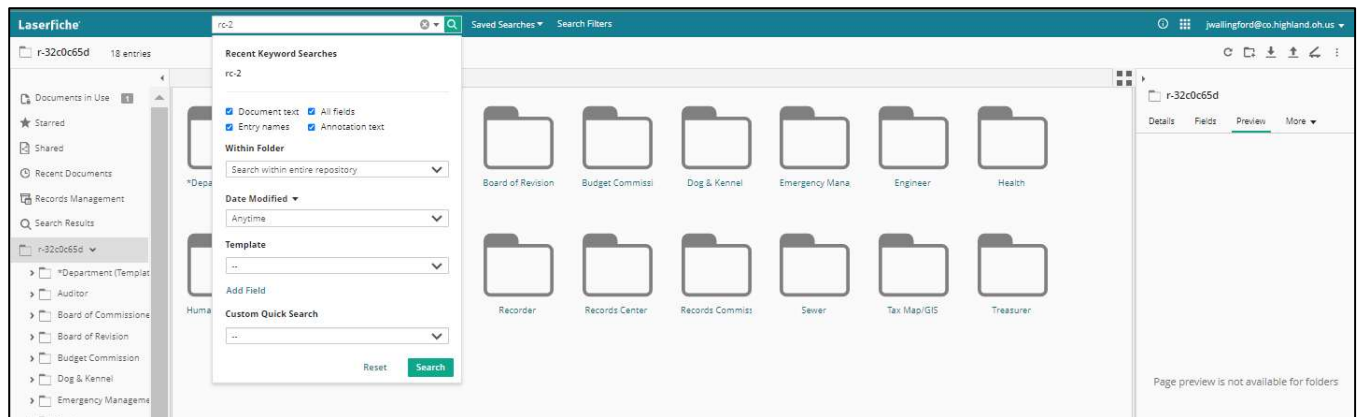
Click the green search icon to run the search. The context in which your search term appears will be displayed at the bottom in the Context Hits pane. Double-clicking a context hit opens the document directly to the page where the search term was found. You can further refine your search based on various criteria in the Search Filters pane. Use the Save button to save this particular search so you can quickly run it in the future without having to reconfigure the search filters.

Pro Tip: If other search categories are present, a document or folder will not qualify as a search result unless it meets all of the specified criteria.

Saving Searches

You can save your searches so that you can quickly re-run them later without having to re-configure them. Searches are saved on a per-user basis, which means that a user will be able to access all searches that they saved, regardless of the computer they use to access the repository, but other users will not be able to access those searches.
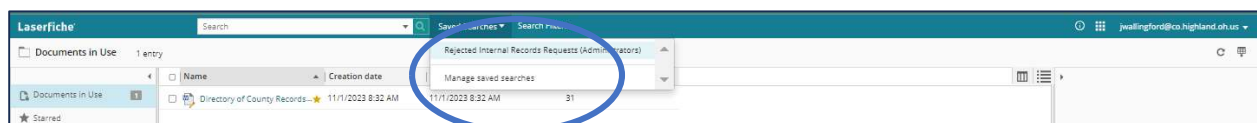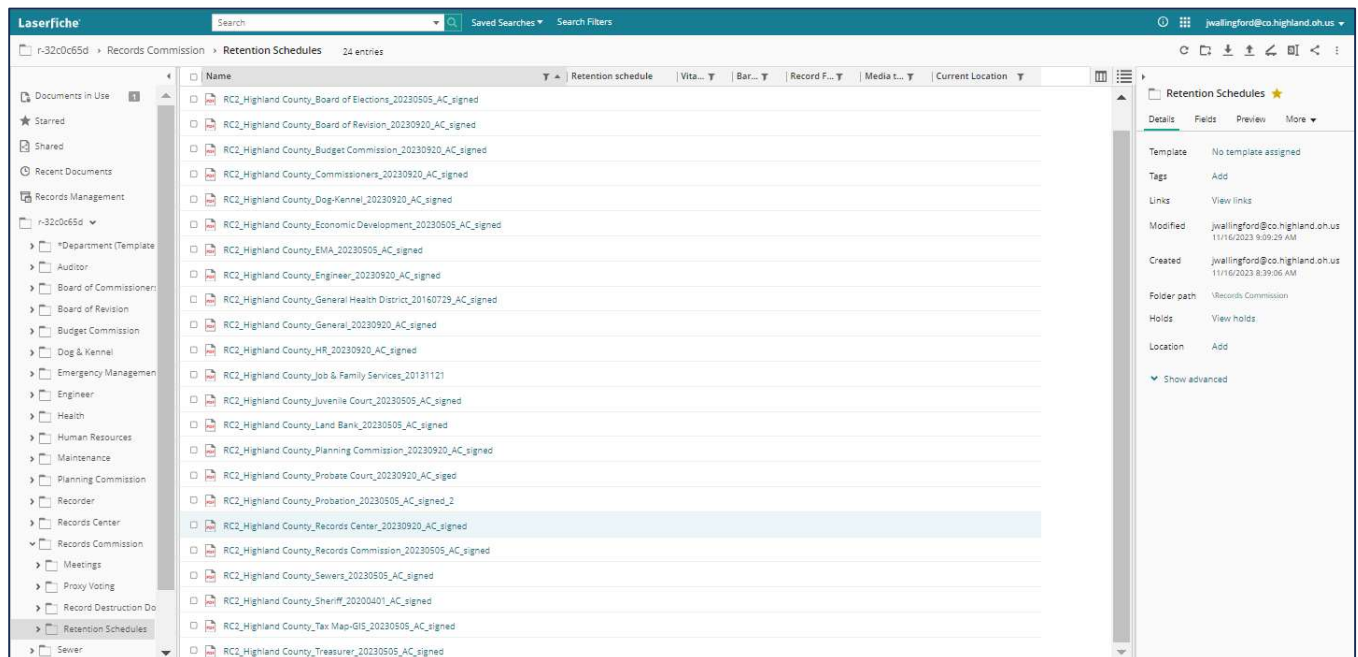

Saved searches are available in the repository toolbar and your Home page.
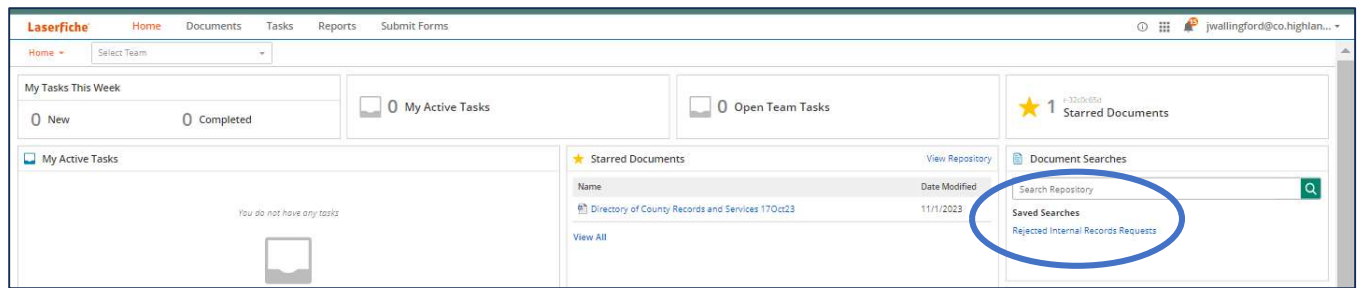
Browsing Folder Structure
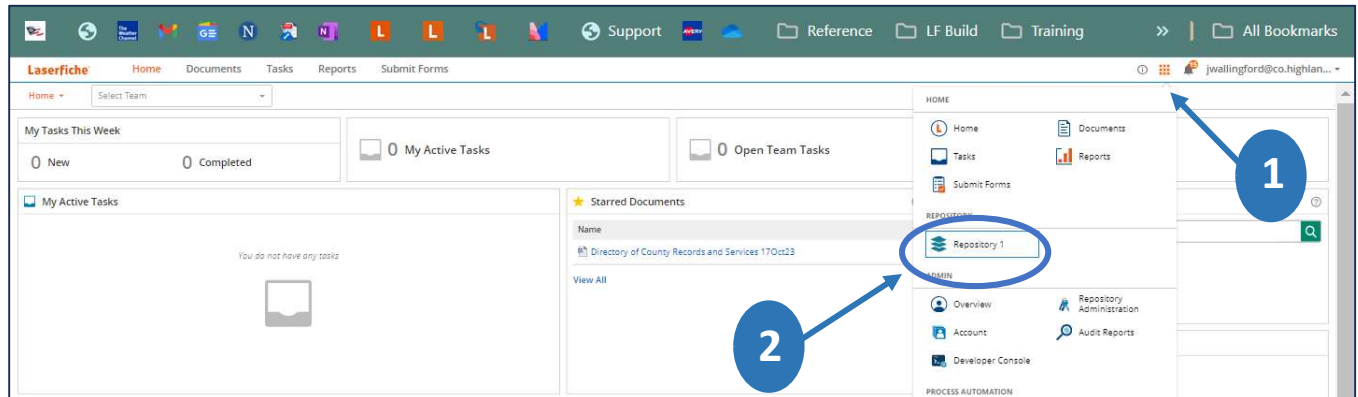
The folder browser lets users browse through a Laserfiche repository. Access the folder browser by selecting the app picker (**1**), then Repository 1 (**2**).

On the left side of the folder browser are the parent folders for each department. If you click on one you can see a complete list of documents and folders it contains in the center pane. The right pane displays entry properties, such as tags, last created and

last modified dates, and any fields or templates that have been applied to the document, as well as a preview pane that lets you preview the contents of a document before opening.

Click on the document name to open it. If the document is of a type that can be opened in Laserfiche, it will open in the document viewer. If not, it will be downloaded and will open in its native application (for instance, Microsoft Word for Word documents). For more information, see Overview of the Folder Browser (4.5-minute video).

Customizing your Folder Browser

You can customize the look of the folder browser in the following ways: determine which columns are displayed and how entries are displayed in the Contents Pane (learn more); and configure the toolbar and its items (learn more).

Starring Documents & Folders

To create a list of often-used folders and/or documents, there are two ways to mark these items for easy retrieval at a later date.   Right-click on a folder or document **(1)**,

then select 'Add Star' or click on the empty star beside the file or folder name in the folder browser **(2)**.
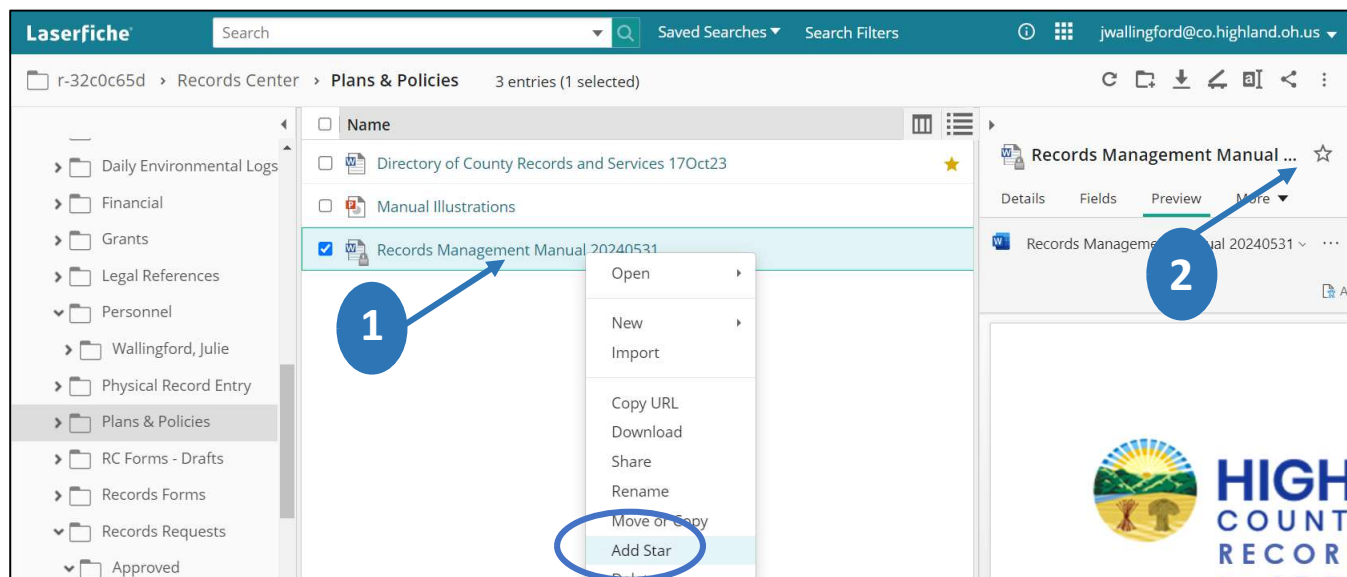
Display Starred Folders & Documents

Starred documents are specific to each user, so each user can maintain a group of documents that will be needed on a repetitive basis. To display, select the 'Starred' option on the left panel of the main display **(1)** or click the star in the right pane **(2)**. Any starred documents will be displayed.
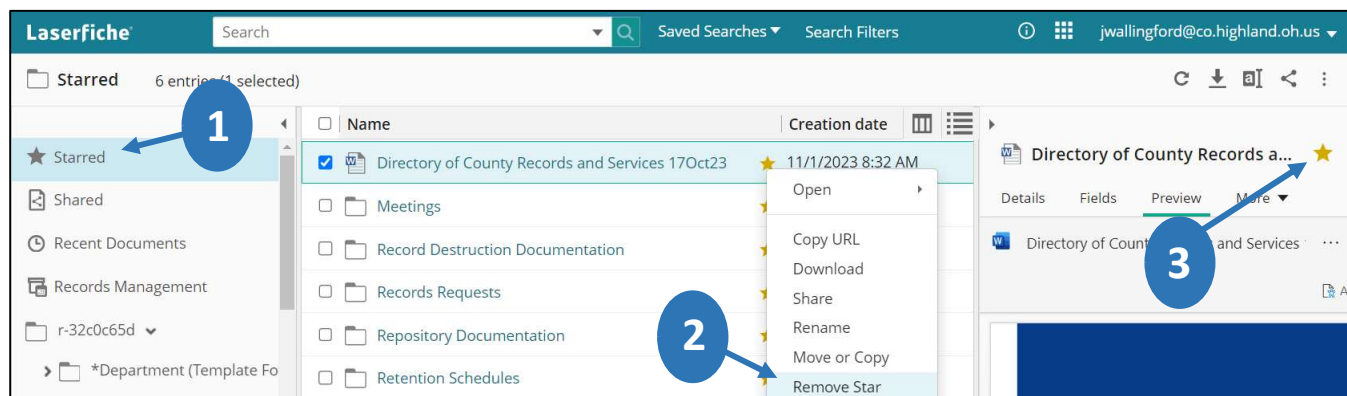
To remove a document from this list, right click and select remove star **(2)** or deselect the star in the upper right corner **(3)**.

OPENING & EDITING DOCUMENTS

If you click on an electronic file, it will open in its native application. The only exceptions are PDFs which open in a Laserfiche PDF viewer by default, and Microsoft Office documents that will open in the document viewer. You can also choose to open PDF

files in your computer's native PDF reader application, by electing to edit the file when prompted in the web client. Other file types stored in Laserfiche are imaged files, known as TIFF files. Those files open directly in the Laserfiche document viewer.

In addition, Laserfiche Cloud gives you many tools for working with documents. Annotations allow you to add information to document pages, such as redactions to hide sensitive information or sticky notes and text boxes to make notes for future reference. Metadata allows you to capture additional information about the document, organize your documents, and make them easier to find. For example, you can use a field to store information such as a client's name or a document type, or a tag to categorize the document. You can then search on this information to quickly locate them in the future. To ensure that information about a document is never lost, you can enable version tracking, which will save a history of the document's changes for future reference, and allow you to revert to a prior version if you need to undo a change.

Document Viewer

The document viewer can display the image pages, text, metadata, thumbnails, and annotations of a document. To view a document in the document viewer, browse to the document you want to view and click it. Records are displayed in the image pane of the document viewer.

By default, when opening a document, the image will conform to the width of the image pane. You can view images full screen, zoom into or out of images **(1)**, and use the panning tool to move images around the image pane. You can also view details like entry properties and metadata as well as annotation information in the properties pane to the right **(2)**. See Overview of the Document Viewer **(2.5-minute watch)** for more information.

Viewing Imaged Documents

The image pane also lets you move through the pages of an imaged document. You can click Previous page or Next page in the toolbar **(3)**, or you can type the page number into the Page field and press Enter. Using the scroll wheel on your mouse (if in Pan mode) or the up and down arrows on your keyboard, you can move continuously through your imaged document. This continuous scroll allows you to see the bottom of a previous page and the top of the next page in the image pane. If in Zoom mode, you can use your scroll wheel to zoom in and out of the image. You can also rotate **(4)**, download, or print **(5)** the document using the buttons on the toolbar.

Checking Out/Checking In Documents

In order to make sure no one edits the same document as you at the same time, you can use the Check Out/Check In option.
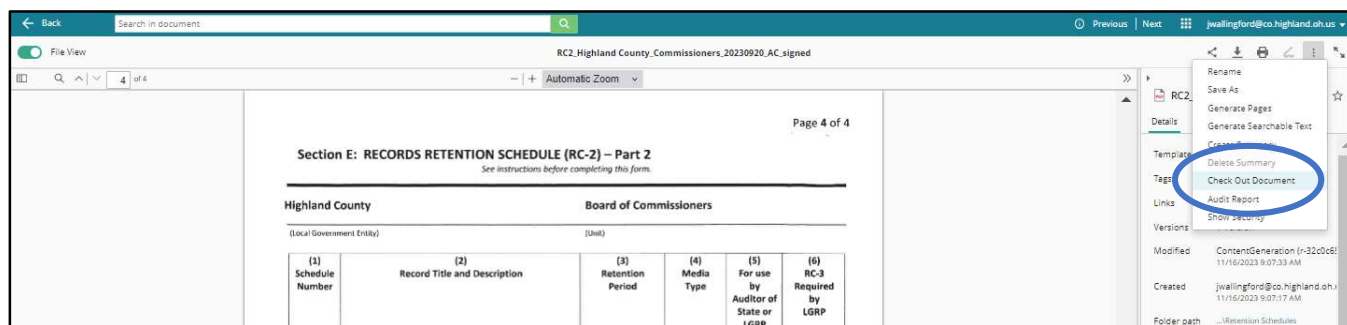
Check out an electronic document when you are ready to work on it and check it back in when you are done. When a document is checked out, it is locked to all other users for editing. An electronic document is checked out automatically when you select that you want to edit it with the desktop version of Microsoft Office, or the relevant software. You can also right-click on the document and select Open – Download and Check Out. Selecting the Documents in Use option in the upper left-hand corner of the Folder

Browser screen allows you to see all your currently checked out documents. For more information, view the [Managing Checked Out Documents](#) video.

Versioning

Our repository uses version control, meaning all changes to the document text, annotations, and metadata are tracked and saved as different versions. You can also view the version history, and the differences between versions or revert to an older version from within the Versions section of the document's Details pane.
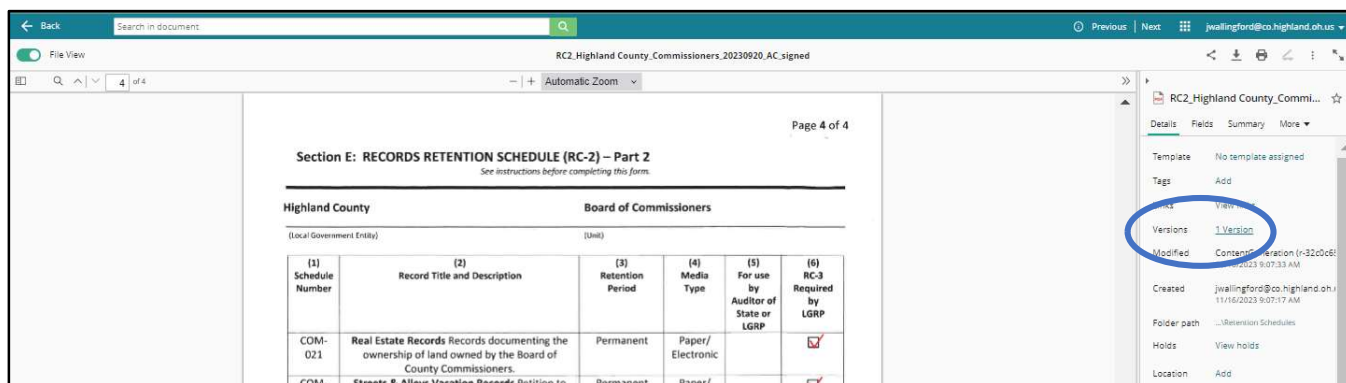
When a folder is placed under version control, any new documents created in that folder will automatically be placed under version control. For more info, check out this video: [Versions in Laserfiche](#).

Customizing the Document Viewer

You can customize the panes in the Laserfiche Windows client document viewer, allowing you to close panes you do not want to use and open panes you do. To modify the configuration of document viewer panes in the web client, click on the Toggle Panes button.

From there, you can toggle through the different pane options. To learn more, watch [Configuring the Document Viewer](#) **(1.5 minute video)** .

MANAGING RECORDS, RETENTION, AND DISPOSITION

Records management features in Laserfiche allow you to process records and record folders according to a life cycle, through creation, retrieval, storage, and disposition. Records managers can define file plans and configure retention rules specific to their organization, then view properties and status information for individual records and record folders in the Records tab of the Metadata Pane. You can access this information in the Folder Browser or when viewing a record in the Document Viewer. The life-cycle timeline displays the record's history and disposition eligibility, and eligible actions such as cutoff, transfer, accession, and destruction can be performed directly on the timeline. Not active yet will need good screenshot

SAVING DOCUMENTS TO THE REPOSITORY

Import Agent

We will utilize Laserfiche Import Agent to add electronic records, automatically naming and saving your files to the correct location in the repository based on our File Plan. The Import Agent is accessed by saving your files in the Shared drive (S:\Laserfiche Repository). Each department has a folder, and within it are folders and subfolders assigned to particular record types.
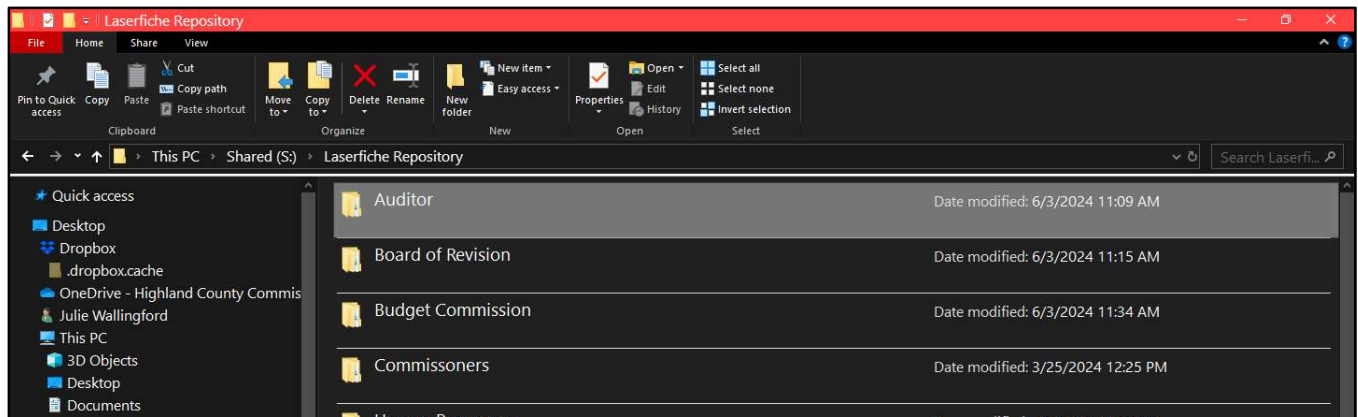
It is important that your files are moved to the correct folder for their record type because this step assigns retention periods. In an incorrect folder, a record may be destroyed before its retention period is over. For any questions about where to save your record, see our File Plan for record titles, descriptions, and destinations.

EXPORTING, SHARING, & PRINTING

Downloading & Printing

Laserfiche offers several ways for you to print or download information from Laserfiche. You can print individual documents, or parts of documents. When downloading a document, you can download pages as a PDF, and you can download electronic files in their original formats; in addition, you can download folders and their contents as ZIP files.

Emailing Records or Links

If selecting email, you have the option of sending the file as an attachment, or as a link to Laserfiche. You can configure the email details directly within the Email Basket dialog box, or check the Use email to manually send the message option to finish composing the email in Microsoft Outlook. For more information check out the video Emailing Documents from Laserfiche Cloud **(2-minute watch)**.

Direct Share

To share a document via Direct Share, select the Direct Share option. You can then configure the settings for the email that will be sent to the recipient, and set the expiration date on the file. The recipient will receive an email with a link to download the file within a specified number of days. To learn more, view the Overview of Direct Share video **(48-second watch)**.

To view the status of files you have shared

From your repository page, click on the Shared quick access view in the left-hand pane. You will see with whom you have shared your content, the status, date shared, expiration date, document names, and whether the files have been downloaded. You may also disable links you have sent by selecting the document and then selecting the disable icon.

RECORDS SERVICES PORTAL

The Record Center's website will have a records services portal where you can ask for additional boxes or bar codes, request hard-copy or scanned documents, or ask for assistance with RC-2 updates and destruction requests.

Screenshots/description

LASERFICHE APP

You can download the app from iTunes, Google Play, or the Windows App Store, or the Amazon App Store.

Android System Requirements

- Android 10 and later
- Recommended 512 MB of memory
- Google Pixelbook now supports the Laserfiche app

iOS System Requirements

- iOS 12
- iOS 14 and later
- iPhone 7 and later
- iPad Air 2 and later
- iPad Mini 4 and later
- iPad Pro (All models)

KEYBOARD SHORTCUTS

Keyboard shortcuts allow you to perform tasks more efficiently using a keyboard instead of a mouse. The following shortcuts can be used in Laserfiche.

Folder Browser Shortcuts	
CTRL+SHIFT+0	Shift focus to the center pane.
CTRL+SHIFT+1	Show or hide the metadata pane. If the metadata pane was hidden, it is both displayed and focus is shifted to it.
CTRL+SHIFT+2	Show or hide the left pane that contains the folder tree. If the left pane was hidden, it is both displayed and focus is shifted to it.
CTRL+SHIFT+5	Open the Starred item list.
CTRL+SHIFT+6	Open the Recently Opened Documents list.
CTRL+SHIFT+7	Open the Documents in Use list. (This keyboard shortcut will only function if you have at least one document locked or checked out.)
CTRL+SHIFT+8	Open search results. (This keyboard shortcut will only function if you have performed a search in your current session.)
CTRL+SHIFT+9	Open the recycle bin.
CTRL+ALT+A	Check out the selected document. (Only one document can be checked out at a time.)
CTRL+SHIFT+ALT+A	Check in the selected document. (Only one document can be checked in at a time.)
CTRL+ALT+C	Open the Move or Copy dialog box.
CTRL+ALT+E	Email selected entry or entries.
CTRL+ALT+F	Extract text from selected entry or entries.
CTRL+ALT+G	Generate pages from selected PDF.
CTRL+ALT+H	Show and modify security.
CTRL+ALT+I	Import into parent folder.
CTRL+ALT+K	Open Scanning.
CTRL+ALT+M	Open the Move or Copy dialog box.

CTRL+ALT+N	Create new folder.
CTRL+ALT+O	Download selected entry or entries.
CTRL+ALT+P	Print selected entry or entries.
CTRL+ALT+R	Restore selected entry or entries from the recycle bin.
CTRL+ALT+S	Add or remove star from selected entry or entries.
CTRL+ALT+T	Purge selected entry or entries from the recycle bin.
CTRL+ALT+U	Undo the check out of the selected document.
CTRL+ALT+Y	Redo.
CTRL+ALT+Z	Undo
CTRL+A	Select all.
CTRL+F	Focus on search bar.
F2	Rename
DEL	Delete
SPACEBAR	Select the item in focus. If you have opened a streaming media file, spacebar will also play or pause the file.
ESC	Close the currently-active dialog box.

Document Viewer Shortcuts	
CTRL+SHIFT+0	Show or hide the PDF Viewer, if the document is a PDF.
CTRL+SHIFT+1	Show or hide the metadata pane. If the metadata pane was hidden, it is both displayed and focus is shifted to it.
CTRL+SHIFT+2	Show or hide the left pane that contains the thumbnails. If the left pane was hidden, it is both displayed and focus is shifted to it.

CTRL+SHIFT+4	Show or hide the text pane.
CTRL+SHIFT++	Zoom in on the page.
CTRL+SHIFT+-	Zoom out on the page.
CTRL+SHIFT+~	Show or hide the metadata pane. (Unlike CTRL+SHIFT+1, this will not shift focus to the metadata pane.)
CTRL+ALT+A	Check out the current document.
CTRL+SHIFT+ALT+A	Check in the current document.
CTRL+ALT+C	Open the Copy Pages To dialog box.
CTRL+ALT+D	Place the currently-selected annotation. The annotation will be placed in the upper left corner of the current page. This keyboard shortcut is supported with sticky notes, stamps, text boxes, callout text boxes, rectangles, rounded rectangles, ellipses, images, and attachments.
CTRL+ALT+E	Email the current document or selected pages.
CTRL+ALT+K	Open Scanning to scan additional pages into the current document.
CTRL+ALT+O	Export the current document.
CTRL+ALT+P	Print the current document.
CTRL+ALT+Q	Move to the previous document.
CTRL+ALT+R	Rotate the selected page or pages.
CTRL+ALT+T	Enter text selection mode.
CTRL+ALT+U	Undo the check out of the current document.
CTRL+ALT+W	Move to the next document.
CTRL+ALT+0	Change the cursor mode to the highlight annotation.
CTRL+ALT+1	Change the cursor mode to the redaction annotation.

CTRL+ALT+2	Change the cursor mode to the sticky note annotation.
CTRL+ALT+3	Open the Stamps dialog, allowing you to select a stamp to apply to the document.
CTRL+ALT+4	Change the cursor mode to the text box annotation.
CTRL+SHIFT+ALT+4	Change the cursor mode to the callout text box annotation.
CTRL+ALT+5	Change the cursor mode to the underline annotation.
CTRL+ALT+6	Change the cursor mode to the strikethrough annotation.
CTRL+ALT+7	Change the cursor mode to the freehand annotation.
CTRL+ALT+8	Change the cursor mode to the line annotation.
CTRL+SHIFT+ALT+8	Change the cursor mode to the ellipse annotation.
CTRL+ALT+9	Change the cursor mode to the polygon annotation.
CTRL+ALT+/	Change the cursor mode to the rectangle annotation.
CTRL+SHIFT+ALT+/	Change the cursor mode to the rounded rectangle annotation.
CTRL+ALT+*	Change the cursor mode to the arrow annotation.
CTRL+ALT+-	Open the image annotation dialog box, allowing you to select an image file to apply to the document.

CTRL+ALT++	Open the attachment annotation dialog box, allowing you to select an attachment file to apply to the document.
CTRL+F	Focus on search bar.
CTRL+S	Save.
F2	Rename
F3	Move to the next context hit. This is only available if you have performed an in-document search.
SHIFT+F3	Move to the previous context hit. This is only available if you have performed an in-document search.
CTRL+F11	Toggle full screen mode.
DEL	Delete
SPACEBAR	Select the item in focus. If you have opened a streaming media file, spacebar will also play or pause the file.
ESC	Close the currently-active dialog box.

Scanning Shortcuts	
ALT+UP	Selects a document's previous page.
ALT+DOWN	Selects a document's next page.
ALT+LEFT	Selects the previous document in the Revision Tree.
ALT+RIGHT	Selects the next document in the Revision Tree.
ALT+SHIFT+LEFT	Displays the previous document in the Revision Tree with an error. Hover over the field's A white exclamation point in a red circle. icon for more information.

ALT+SHIFT+RIGHT	Displays the next document in the Revision Tree with an error.
CTRL+G	Displays a specific page in a document.
CTRL+N	Enables the Create Document feature.
CTRL+D	Enables the Split Document feature.
CTRL+Z	Will undo your last action. Only applies to text boxes.
CTRL+Y	Will redo your last action. Only applies to text boxes.
CTRL+X	Cuts the currently selected item.
CTRL+C	Copies the currently selected item.
CTRL+V	Pastes the last item that was copied or cut.
DEL	Deletes the currently selected item.
CTRL+A	Selects all available items. Only applies to text boxes.
CTRL+M	Renames an item. You can also press F2.
CTRL++	Zooms in on the Display Pane.
CTRL+-	Zooms out on the Display Pane.
CTRL+ALT++	Zooms in on the Thumbnails Pane.
CTRL+ALT+-	Zooms out on the Thumbnails Pane.
CTRL+I	Displays scanned images and no text.
CTRL+T	Displays OCRed text and no images.
CTRL+ALT+I	Splits the Display Pane. The top section displays an image. The bottom displays text.
CTRL+ALT+T	Splits the Display Pane. The top section displays text. The bottom displays an image.
CTRL+SHIFT+I	Splits the Display Pane. The left section displays an image. The right section displays text.

CTRL+SHIFT+T	Splits the Display Pane. The left section displays text. The right displays an image.
CTRL+H	Enables/disables the Pan tool in the Display Pane. When enabled, drag in the direction you want to view.
CTRL+L	Rotates an image 270 degrees (left).
CTRL+R	Rotates an image 90 degrees (right).
CTRL+S	Start scanning a new document or into an existing document.
CTRL+O	Stop scanning.
CTRL+SHIFT+E	Opens/closes the Error Log Pane.
F4	Opens/closes the Document Properties Pane.
F3	Opens/closes the Output Log Pane.
F7	Opens/closes the Scanning Explorer Pane.
F8	Opens/closes the Thumbnails Pane.
CTRL+ALT+L	Restores the default pane layout.
CTRL+SHIFT+H	Toggles auto-hide for the active pane (if applicable).
ALT+F4	Close Laserfiche Scanning.
TAB	Selects the next item in the Document Properties Pane
ENTER	Selects the next field in the Document Properties Pane

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