



CITY OF BURLINGAME

Procedures for Searching, Storing, and Deleting Records in Laserfiche

VERSION 1 DATED: 10.06.2025

Scope

These procedures apply to employees, temporary workers, and contractors who do business on behalf of the City of Burlingame.

References

- Records Retention Schedule
- Records Management Policy
- Procedures for Managing Records

1. Procedures for Searching in Laserfiche

Purpose

The purpose of these procedures is to provide the steps for searching in the City's Records Repository. These procedures define the steps taken to search for records in Laserfiche.

Common Searching in Laserfiche

- Log into Laserfiche with username and password and navigate to the City's Records Repository.
- Use the search bar at the top of the page. Laserfiche is automatically set to "Common" search.
- Type in a search term and click the magnifying glass icon.
- The search results will appear in the middle of your screen. The "Context Hits" pane on the bottom of the screen will show where the search term appears in that particular document.
- Either click open the document in the middle of the screen or double click the page result in the "Context Hits" pane on the bottom of the screen to take you to a specific page.
- If you double click the specific page of a document in the "Context Hits" pane, you will see the search term highlighted in color.
- Use the "Find in Document" icon in the top left of the document to move through where the search term is found.

Advanced Searching in Laserfiche

- For advanced searching, click "Advanced" to the right of the search bar. An "Advanced Search" window will appear.
- A "Common" search bar will automatically appear for you to type in a search term.
- Use the "Search Types" drop-down menu to select the advanced searching tool you'd like to use.
- Here you can search by "Field", "Name", "Within Folder", etc. to narrow your search down. If you choose to search by "Field" you can search for a certain template and its metadata.
- Once you have selected the criteria for your advanced search, click "Search".
- The search results will appear in the middle of your screen. The "Context Hits" pane on the bottom of the screen will show where the search term appears in that particular document.



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- Either click open the document in the middle of the screen or double click the page results in the “Context Hits” pane on the bottom of the screen to take you to a specific page.
- If you double click the specific page of a document in the “Context Hits” pane, you will see the search term highlighted in color.
- Use the “Find in Document” icon in the top left of the document to move through where the search term is found.

2. Procedures for Scanning, Uploading, and Importing to Laserfiche

Purpose

The purpose of these procedures is to provide the steps for adding documents to the City’s Records Repository. These procedures define the steps taken to scan, import and upload records into Laserfiche.

Scanning Paper Directly to Laserfiche

- Prepare documents (i.e. remove paperclips and staples, make sure pages are facing the same way, etc.)
- Log into Laserfiche and navigate to the Repository.
- Choose your department’s folder which you will be scanning into.
- Click on the scanning icon in the upper left corner. A new window for scanning will open.
- Place the pages to be scanned in the scanner. Scan one document type at a time (e.g. Resolutions, Ordinances, Minutes, etc.).
- Click the “Start Scanning” at the top middle of the screen. Pages will be pulled through the scanner. Once scanned in, the pages will show up as thumbnails on your computer screen.
- Count the pages on the screen to ensure all pages came through. Delete the pages that are blank.
- If multiple documents are scanned in at the same time, separate the documents by right clicking the first page of the document you want to separate out and click “Separate”.
- Give the document a name in the “Default Document Name:” field on the top right of the screen.
- In the “Document Properties” pane, select a template from the “Template” drop-down menu.
- Index the document by filling in the metadata.
- Once all indexing is complete, click “Store” on the bottom of the indexing pane. The document will be moved into its respective folder.

Note: If you scanned in multiple documents at one time, make sure all indexing fields are complete for each document before moving to the next document.

Importing to Laserfiche

- Click the “Import” icon on the top right of the screen.
- The “Import File” screen will appear. Click “Browse” and find the document to be imported.
- Click “Open” to import the document to Laserfiche and click “OK” in the “Import File” window.



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- A new window will appear. Click the “Fields” tab, and choose a template from the drop-down menu.
- Fill out the metadata fields and click “Import”. The document will then be sent to its assigned folder.

Drag and Drop to Laserfiche

- Open your department’s folder in Laserfiche.
- Open location of document you wish to save to Laserfiche.
- To drag a document to your department’s folder for indexing, left click and hold down on the mouse while dragging the document over into the chosen folder. Release your hold on the left click of the mouse once the document is over the chosen folder.
- After the document has been uploaded, a new window will pop up. Click the “Fields” tab and choose a template from the drop-down menu.
- Fill out the metadata fields and click “Import”. The document will then be sent to its assigned folder.

3. Procedures for Deletion of Records from Laserfiche

Purpose

The purpose of these procedures is to provide the steps to completed in destroying “official” electronic City records stored in the City’s Records Repository once their retention period has passed. Records that reside outside of the Laserfiche Repository are not addressed in this procedure.

Procedures

Annually, the City Clerk will initiate the process to delete obsolete electronic official records from Laserfiche.

- The City Clerk contacts the City Attorney requesting information regarding any active or potential legal action(s) against the City to determine which category(s) of records may be relevant to the action and therefore should be preserved and placed on a Legal Hold.
- The City Clerk searches for the relevant records, suspends their destruction date, and annotates the records to indicate that they are on a Legal Hold.
- The City Clerk prepares a Records Notification containing a list of records eligible for deletion based on the Retention Schedule requirements. The notification specifies the date on which deletion of these records is scheduled to occur.
- The City Clerk sends the Records Notification to departments regarding the required deletion of obsolete electronic records in Laserfiche. Included in the notification is a link to the Retention Schedule and who to call with questions. The Records Notification is to include the following:
 - Record categories that shall not be deleted due to their relevance in a legal action.
 - The list of records eligible for deletion according to the City’s Retention Schedule.
 - The date on which the obsolete records will be deleted.



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- Departments are to notify the City Clerk's Office within the specified timeframe on the Records Notification if any of the records to be deleted should be exempt from deletion and provide justification. In addition, departments are to notify the City Clerk if any of the documents on the list should be considered as having historical value.
- The City Clerk prepares a Records Destruction Form for each department with records that have been approved by the Departments and Retention Schedule for deletion from Laserfiche. This form is to be approved by the Department Head, the City Clerk, and the City Attorney prior to records being deleted.
- The City Clerk maintains the documentation of compliance with these guidelines in accordance with the Retention Schedule.