BMI imaging systems

INDUSTRY
- State & Local Government > City Clerk

LOCATION
- Saratoga, California

CHALLENGES
- Small city lacking manpower and equipment to efficiently digitize paper records on-site
- Older records from 1980s require a lot of prep work labor prior to digitization

BMI PRODUCTS & SERVICES
- Ongoing document scanning for several Departments: Building and Planning, Public Works, Finance
- Using indexing, barcoding, and BMI developed software designed for efficiency and accuracy

BENEFITS
- Ongoing partnership has enabled the development of processes designed for scale and ongoing paper digitization work
- Laserfiche load files that minimize IT staff time at the City to populate Laserfiche with the digital records

Case Study

Overview

The City of Saratoga is an attractive residential community with a small-town vibe. Known for its high quality of life, excellent schools and distinctive businesses, Saratoga has a wealth of activities available to residents and visitors. The City is proud to be served by a variety of public agencies.

BMI Imaging has been providing Saratoga's Building, Planning, Public Works, and Finance departments with paper scanning services since October of 2017. Debbie Bretschneider, Saratoga City Clerk, states "We have worked with Jim Detrick since 2002 at his prior organization and have found it beneficial to partner over the long-term with one organization for our Laserfiche document conversion and indexing requirements across various City Departments."

Comprehensive Laserfiche Scanning and Indexing Incorporating City Data for Maximum Efficiency and Accuracy

Several City of Saratoga departments regularly send hard-copy documents/ maps and related, Excel-based indexing information to BMI Imaging for conversion to a digital format compliant with the City's Laserfiche document management system.

- Building and Planning submit address files, plan sets and supporting documents (applications, permits, reports, correspondence etc.).
- Public Works submits map/plan sets (tract/subdivision improvements, project plans etc.).
- Finance submits budget and bond issue documents/reports.

The digital conversion process includes document preparation, scanning in black/white or color - depending upon each department's requirements - and indexing using the department-furnished document index data.

To facilitate the document indexing process, every City department creates a spreadsheet that includes a layout of the Laserfiche index template values for that department's records.

BMI's conversion process utilizes this City-furnished data to print and scan intelligent barcode sheets for each document. During the document conversion, those sheets facilitate a very efficient and accurate indexing process by linking each document's barcode sheet-based information to the related document index information.

Data Formatting and Delivery

Once the document preparation, scanning and indexing processes have been completed, BMI leverages Unity, its proprietary production workflow and control/reporting platform, to output the imaged documents and their associated metadata for delivery. In every case, this output is precisely formatted for import into the City's Laserfiche system.

The complete deliverable is recorded to DVD-R media (a permanent, unalterable storage media) and delivered to City IT staff along with the processed records. The DVD-R deliverable includes a sophisticated Laserfiche load file that includes all of the instructions required to automatically (and magically!) populate the Laserfiche index template, create any required folders/subfolders and name the document during the standard Laserfiche import process.

Conclusion

City Clerk Bretschneider states, "We have enjoyed a long-term relationship with Jim and the team at BMI. We've all worked together to build a highly efficient, accurate process to scan our paper and ingest it into our Laserfiche environment."