NINE PEAKS SOLUTIONS
Your 'Peak' Performance Technology Partner®

LASERFICHE USE CASE

County Board of Commissioners Agenda & Meeting Records Management

Using Laserfiche® to organize, manage, and preserve county meeting records

KEEP AGENDAS, MINUTES, AND SUPPORTING RECORDS TOGETHER

Use Laserfiche to organize meeting agendas, minutes, and supporting documents in one searchable repository. Track preparation and approval activities, preserve official records, and make approved public documents accessible.

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People | Solutions | Lasting Results

Laserfiche® Solution Provider



THE NINE PEAKS COLLECTION

Mt. Jefferson | Peak 2 of 9

One of the nine Cascade peaks that inspired the name Nine Peaks Solutions

Discover the mountains behind our name:
The Mountains

USE CASE SNAPSHOT

Why County Meeting Records Need a Deliberate Process

County Boards of Commissioners manage agendas, staff reports, resolutions, ordinances, minutes, and supporting materials involving multiple departments and public interests. When these records are maintained in separate locations or managed through disconnected processes, staff can spend unnecessary time preparing meeting packets, locating approvals, publishing information, and responding to records requests.

ITEM	PRACTICAL FOCUS
Audience	County clerks, board administrators, records staff, department coordinators, legal reviewers, and information technology staff
Operational challenge	Collect agenda items and supporting documents from multiple departments, manage reviews and approvals, publish appropriate meeting materials, and preserve the official meeting record.
Desired outcome	A consistent, searchable meeting-records structure that connects agendas, supporting materials, approved minutes, and related actions while supporting timely public access.
Laserfiche capabilities	Repository folders, templates and fields, search, Forms, Workflow, security, document sharing or publishing, and Records Management.

What is your current process?

Take a few minutes to outline your existing process, from preparing the meeting agenda through making the final meeting records available. Include department submissions, reviews, approvals, meeting recordings, preparation of minutes, and publication. Identify the steps, handoffs, and systems involved.

What is the baseline for availability?

Estimate or measure the time required for each major step in your current process. How long does agenda preparation take? How much time passes between the meeting and the availability of recordings, draft minutes, and approved minutes? Record these measurements to establish a baseline for evaluating future improvements.

RECORDS MANAGEMENT REMINDER

Determine the applicable record series, retention requirements, access restrictions, and disposition procedures with the county's records officer and legal counsel. Agendas, minutes, supporting materials, and related records may have different retention requirements. Confirm applicable public meetings and public records obligations before establishing publication or disposition processes.

BUILD THIS SOLUTION

Use One Laserfiche Folder for Each Board Meeting

Create a Board of Commissioners meeting records area within the county's approved repository structure. Use a separate folder for each meeting, organized by meeting date and, where appropriate, meeting type. Keep the agenda, supporting materials, and official meeting records together while applying appropriate access and retention controls.

- Meeting agenda and final agenda packet
- Department submissions, staff reports, and recommendations
- Exhibits, presentations, maps, and supporting attachments
- Resolutions, ordinances, orders, and other board actions
- Draft and approved meeting minutes
- Correspondence and approval records requiring retention
- Links to related contracts, agreements, projects, or other county records
- Meeting recordings (audio and video), including links to recordings maintained in approved external systems

Four Steps to Organize Board Meeting Records

Start within the repository location your organization already uses for public meeting records. Create one folder for each meeting and use a consistent folder name that staff will recognize.

Step 1	**Choose the repository location** Use the county's approved records area for Board of Commissioners meetings rather than creating a separate, unofficial collection.
Step 2	**Create one folder per meeting** Organize folders by meeting date and type. Keep agendas, supporting materials, and official meeting records together.
Step 3	**Apply the meeting template to the folder** Use folder-level metadata for meeting date, meeting type, status, and other information needed for searching and reporting.
Step 4	**Add and maintain meeting records** Include agendas, supporting documents, board actions, approved minutes, and audio/video recordings or references to them. Maintain appropriate access and retention controls.

Suggested Meeting Folder Names

Use a consistent naming convention that identifies the meeting date and type. Examples include **2027-01-13 Regular Meeting**, **2027-01-27 Work Session**, and **2027-02-10 Special Meeting**. The meeting date, type, and status should also be maintained as searchable metadata fields rather than relying solely on the folder name.

THE IMPROVEMENT OPPORTUNITY

From Meeting to Published Records: Measuring Cycle Time

How long does it take today to prepare a Board of Commissioners agenda, and how long after the meeting does it take to make recordings and minutes available?

Use the Plan–Do–Check–Act (PDCA) continuous improvement cycle to evaluate the current process, implement improvements, measure results, and refine the process over time.

PDCA stage	County meeting records application
Plan	Measure current agenda preparation time and the elapsed time between a meeting and the initial publication of recordings and draft minutes. Identify delays and handoffs.
Do	Implement meeting folders, metadata, approval workflows, recording uploads, queued transcription, and AI-assisted summaries. Make the appropriate public-facing documents available through the Public Portal.
Check	Compare actual cycle times against the baseline. Measure rework, accuracy, and publication delays.
Act	Refine the process, address bottlenecks, and establish improved procedures for subsequent meetings.

TARGET SERVICE LEVEL

A Goal: The Next Business Day

Establish a goal of making meeting audio and video recordings, along with reviewed draft minutes, available on the next business day following a Board meeting.

Final approved minutes may require formal adoption at a subsequent meeting. Publication and retention procedures must follow applicable statutory requirements, county policies, and established approval processes.

IMPLEMENTATION

Technical Configuration and Meeting Processing

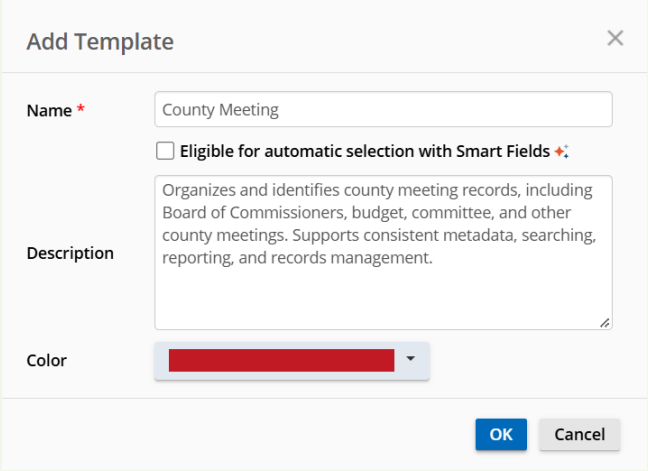
Initial configuration establishes the repository structure, meeting template, and metadata fields needed to organize and manage county meeting records.

Prepare the structures that will be necessary for your meetings

Step 1

Create the Template

Create the County Meeting template and select a color, if desired. In this example, red identifies folders containing public records. The color serves as a visual cue; it does not establish records retention requirements. Configure the appropriate Laserfiche Records Management settings separately.



Step 2

Create the Metadata Fields

Create the metadata fields and add them to the County Meeting template. Consistent field definitions and values support searching, reporting, and management of meeting records.

Field / Type	Example Values
Meeting Body Drop Down Selection	Board of Commissioners, Budget Committee, Noxious Weed Control Board
Meeting Type Drop Down Selection	Regular Meeting, Special Meeting, Work Session, Public Hearing
Meeting Date Short Date Field	10-28-2026 11:00– set up for the field would be MM-dd-yyyy HH:mm
Meeting Status Drop Down Selection	Scheduled, Completed, Minutes Pending, Closed
Meeting Title Fill in text field	January Regular Meeting
Minutes Approval Date Short Date Field	11-10-2026 11:00– set up for the field would be MM-dd-yyyy HH:mm
Recording Location Fill in text field	URL reference for externally stored recording

Example: Creating a Meeting Body Field

Create a dropdown field named **Meeting Body** to identify the county board or committee associated with each meeting. Define standardized choices such as Board of Commissioners, Budget Committee, and Noxious Weed Control Board.

An optional **Other** choice accommodates additional meeting bodies. Add the field to the County Meeting template so staff can select the appropriate meeting body when organizing meeting records.

Consistent metadata improves searching, reporting, and the ability to locate records across multiple meetings.

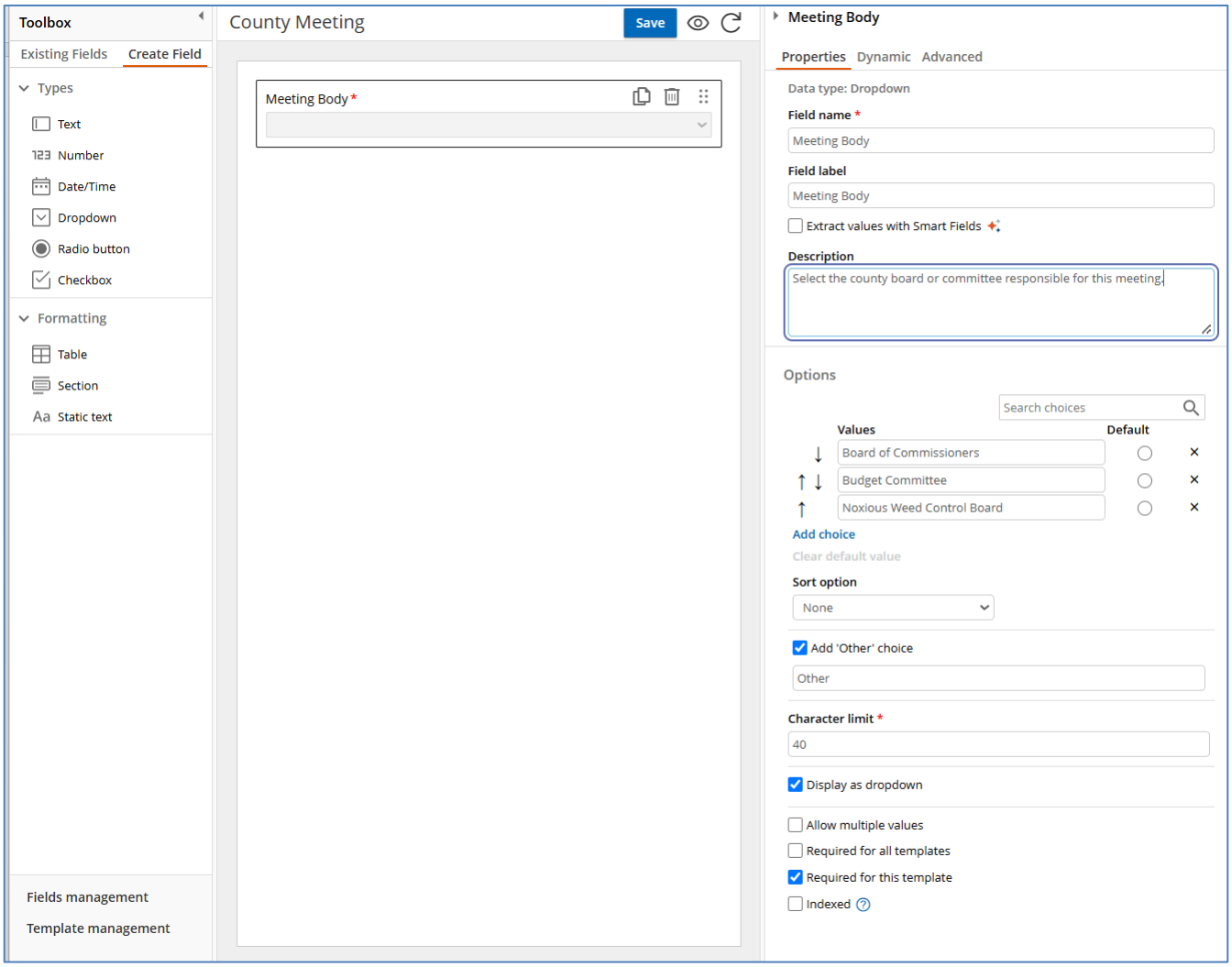


Figure 1 - Configuring the Meeting Body dropdown field in the Laserfiche Cloud County Meeting template.

Usage – The Meeting Lifecycle

Step 1	**Create the Folder** Create a dated meeting folder within the appropriate county meeting body folder. This folder will contain the documents and records associated with that meeting.
Step 2	**Apply and Complete the Meeting Template.** Apply the County Meeting template to the folder. Enter the meeting body, type, date, title, and status. Maintain and update the metadata as the meeting progresses.
Step 3	**Prepare and Publish the Agenda** Prepare the meeting agenda and complete the required reviews and approvals. Publish the agenda according to applicable public meeting requirements and county procedures.
Step 4	**Gather Supporting Documents** Collect staff reports, presentations, exhibits, and other supporting materials. Organize them within the meeting folder and identify which documents are appropriate for public access.
Step 5	**Share Public Meeting Materials** Make appropriate public-facing documents available through the Laserfiche Public Portal, if implemented. This provides stakeholders with convenient access to meeting information and may reduce routine public information requests.
Step 6	**Conduct the Meeting** Record meeting notes, motions, votes, and decisions as the meeting progresses. Capture audio or video recordings according to county procedures.
Step 7	**Upload the Meeting Recording** Upload the meeting recording to the appropriate folder in Laserfiche, or maintain a reference to an approved external recording location. Make the recording publicly accessible when appropriate.
Step 8	**Queue the Recording for Transcription** Submit the meeting recording for transcription processing. Once completed, retain the resulting transcript according to the county's records management procedures.
Step 9	**Prepare an AI-Assisted Meeting Summary** Use the completed transcription to generate an AI-assisted summary of the meeting. Review the summary for accuracy and completeness before relying on its contents.
Step 10	**Prepare and Review Draft Minutes** Use the transcript, meeting summary, and staff notes to prepare draft minutes. Verify motions, votes, decisions, and other significant information. Save the draft in the meeting folder and route it for authorized review. AI assistance may support preparation, but human verification remains essential.
Step 11	**Finalize the Meeting Records** Following formal approval, retain the approved minutes, update the Minutes Approval Date and Meeting Status fields, and complete the applicable publication and records management activities.

Evaluating the Cost of Transcription and Summarization

Transcription and AI-assisted summarization may introduce additional processing or licensing costs. Evaluate these expenses against the potential improvements in staff productivity, meeting-record availability, and accuracy.

Compare the current time and effort required to prepare and review meeting records with the improved process. Consider how faster access to searchable transcripts and meeting summaries benefits county staff, elected officials, and the public.

The objective is not simply to reduce costs. It is to determine whether the additional capabilities provide measurable operational value that justifies their expense.

Example: Repository Folder Structure for Meetings

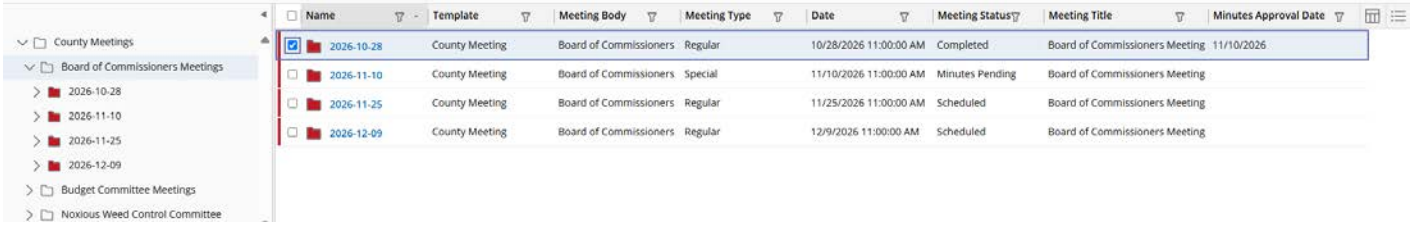


Figure 2 – The Repository Structure with a Saved Column Setup Displayed

Example: A Populated County Meeting Template

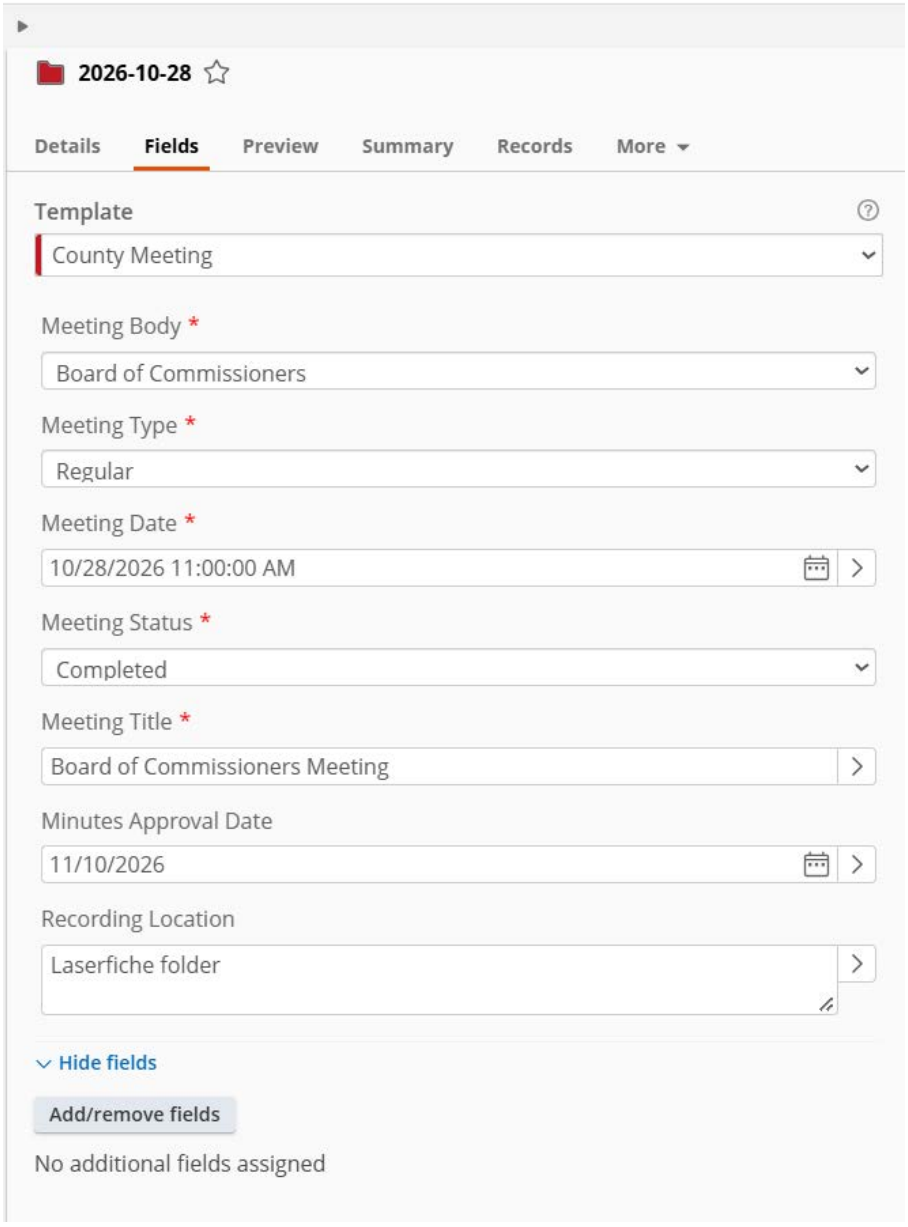


Figure 3 – A Populated Meeting Template Completed with the Applicable Metadata

EXTEND AND GOVERN THE SOLUTION

Add Automation After the Foundation Is Working

The meeting folder structure, County Meeting template, and metadata fields provide immediate value without requiring extensive automation. Once staff consistently organize and maintain meeting records, additional Laserfiche capabilities can reduce manual effort, improve availability, and support the county's continuous improvement goals.

Workflow Reminders and Approvals

Laserfiche Workflow can help coordinate agenda submissions, notify staff of approaching deadlines, route materials for review, and track approval activities. Establish clear responsibilities for preparing agendas, collecting supporting documents, reviewing draft minutes, and publishing approved records.

Transcription and AI-Assisted Summaries

Meeting recordings can be uploaded to Laserfiche and queued for transcription. Once processing is complete, staff can use the resulting transcript to prepare an AI-assisted summary and support the development of draft minutes.

Licensing and usage note: Transcription and AI-assisted capabilities vary by Laserfiche Cloud subscription tier and may be subject to usage limits or additional charges. Confirm current feature availability, licensing requirements, and anticipated processing costs before implementation.

Human review: Transcripts and AI-generated summaries may contain errors or omissions. Authorized staff must verify meeting discussions, motions, votes, and decisions against the recording and other official information. AI-assisted content does not replace the county's formal minutes approval process.

Records Security, Publication, and Retention

- Confirm the authoritative meeting records and applicable record series with the county's records officer.
- Apply appropriate security controls to drafts, confidential information, and exempt records.
- Publish public-facing agendas, supporting documents, recordings, and minutes according to county policy and applicable requirements.
- Establish retention procedures for recordings, transcripts, summaries, draft minutes, approved minutes, and related materials.
- Document legal holds, review requirements, and authorized disposition procedures.

Implementation and Improvement Checklist

- Pilot the solution with several meetings representing different county boards or committees.
- Validate folder naming, required metadata fields, dropdown choices, and search results.
- Test agenda preparation, recording uploads, queued transcription, summaries, and minutes review.
- Measure cycle time and staff effort against the baseline established before implementation.
- Review publication timeliness, accuracy, staff feedback, and stakeholder access.
- Refine the process through the Plan–Do–Check–Act cycle and establish ongoing performance measures.

Resources and Next Steps

Official Oregon References

Oregon Revised Statutes Chapter 192 — Public Records and Public Meetings
Oregon State Archives — Records Management and Local Government Retention Schedules
Applicable county policies, meeting procedures, and records retention requirements

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