NINE PEAKS SOLUTIONS®
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LASERFICHE USE CASE

MANAGING INTERGOVERNMENTAL AGREEMENTS

Using Laserfiche® to organize, monitor, and retrieve agreement records

KEEP THE AGREEMENT AND ITS HISTORY TOGETHER

Use the Laserfiche repository to keep the executed agreement, approval history, amendments, responsibilities, and important dates together - with automated reminders before action is required.

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Laserfiche® Solution Provider

THE NINE PEAKS COLLECTION

Mt. Washington | Peak 4 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 Agreement Management Needs a Deliberate Process

Intergovernmental agreements often involve several departments, public agencies, approval steps, and operational responsibilities. When the signed agreement, exhibits, council action, amendments, and date information are stored separately, staff can spend unnecessary time reconstructing the complete record.

ITEM	PRACTICAL FOCUS
Audience	Municipal recorders, city clerks, records staff, department owners, legal reviewers, and administrators
Operational challenge	The recorder needs a current inventory of every IGA and must be ready to answer questions by title, partner agency, dates, and contact information.
Desired outcome	One folder per IGA in Laserfiche, with the agreement records inside and consistent information displayed as sortable repository columns.
Laserfiche capabilities	Repository folders, templates and fields, saved columns, sorting and filtering, Excel export, security, and Records Management.

Use One Laserfiche Folder for Each IGA

Create an IGA area within the appropriate repository location, then create a separate folder for each agreement. Apply the Intergovernmental Agreement template to the folder itself. The folder fields describe the agreement, while the actual agreement and related documents remain together inside the folder.

- Executed agreement and all exhibits, schedules, maps, and attachments
- Council action, resolution, ordinance, minutes, or other authorization
- Amendments, renewals, extensions, notices, and termination documents
- Certificates, insurance documents, service levels, or financial schedules
- Correspondence or review records that must be retained with the agreement
- Links to related projects, contracts, grants, property, or operational records

RECORDS MANAGEMENT REMINDER

Determine the applicable record series, cutoff event, retention period, access requirements, and disposition process with your records officer and legal counsel. The agreement may also create separate program or transaction records with different retention requirements.

BUILD THIS SOLUTION

Create One Folder for Each Agreement

Start within the repository location your organization already uses for administrative records or intergovernmental agreements. Create one folder for each IGA and use a consistent folder name that staff will recognize.

Step 1	**Choose the repository location** Use the approved records area rather than creating a separate unofficial collection.
Step 2	**Create one folder per IGA** The folder becomes the container for the agreement, exhibits, approvals, amendments, renewals, notices, and termination records.
Step 3	**Apply the IGA template to the folder** Folder-level metadata allows the agreement inventory to appear as columns without repeating the same values on every document.
Step 4	**Add the agreement records** Place the executed copy and supporting records inside the folder and connect any records that remain in another approved location.

City Clerk › AR Administrative Records 6 entries

Name	Title	Agency	Start Date	Expiration Date	Contact Information	Template	Creation date	Last modified	Pag...
Dispatch	Dispatch Services	Local County 911	7/1/2026	6/30/2028	Local County 911 Director	Intergovernmental Agreement (IGA)	7/13/2026 9:19 AM	7/13/2026 9:41 AM	
EMS	Emergency Medical Services	Pooled EMS Agency	7/1/2026	6/30/2027	EMS Company Admin VP	Intergovernmental Agreement (IGA)	7/13/2026 9:19 AM	7/13/2026 9:42 AM	
Law Enforcement Patrol #1	Law Enforcement Patrol #1	County Sheriff	7/1/2022	6/30/2030	Sheriff Brody	Intergovernmental Agreement (IGA)	7/13/2026 9:19 AM	7/13/2026 9:34 AM	
Law Enforcement Patrol #2	Law Enforcement Patrol #2	Neighboring City	7/1/2024	6/30/2030	Chief Atkins	Intergovernmental Agreement (IGA)	7/13/2026 9:19 AM	7/13/2026 9:35 AM	
School Resource Officer #1	School Resource Officer Middle School	Neighboring City	7/1/2024	8/31/2026	Chief Atkins	Intergovernmental Agreement (IGA)	7/13/2026 9:18 AM	7/13/2026 9:40 AM	
School Resource Officer #2	School Resource Officer High School	Neighboring City	7/1/2018	8/31/2025	Chief Atkins	Intergovernmental Agreement (IGA)	7/13/2026 9:18 AM	7/13/2026 9:39 AM	

Example IGA folders displayed with saved metadata columns in Laserfiche

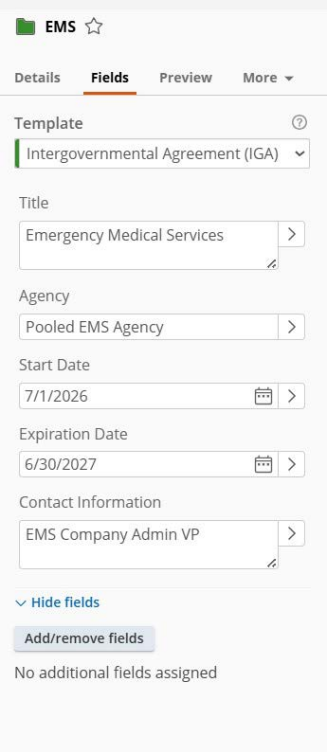
Suggested Folder Naming

Use a short name that distinguishes the agreement at a glance. Examples in the demonstration repository include Dispatch, EMS, Law Enforcement Patrol, and School Resource Officer. The formal agreement title remains available in the Title field.

CONFIGURE THE TEMPLATE

Create the Intergovernmental Agreement Template

Create a reusable Intergovernmental Agreement template in repository administration. Apply it to each IGA folder and enter the information staff will need for search, reporting, and follow-up.



Core fields shown in the demonstration

- Title
- Agency
- Start Date
- Expiration Date
- Contact Information

Recommended additions

- Contact Name
- Contact Email
- Contact Phone
- Responsible Department
- Agreement Status or Review Status

The demonstration reflects the first configuration. Contact Email and Contact Phone were added to the expanded design.

FIELD	TYPE	PURPOSE
Title	Text	Formal or commonly used agreement title
Agency	Text or list	Other governmental entity or participating agency
Start Date	Date	Effective or service start date
Expiration Date	Date	Expiration, end, or next review date
Contact Name	Text	Primary contact for the other party
Contact Email	Text	Email address kept separately for search and reporting
Contact Phone	Text	Telephone number with extension when applicable

Create a Saved Column View

Display the folder name and IGA template fields as repository columns. Save the column configuration so staff can return to the same operational view without rebuilding it each time.

Step 1	**Open the parent IGA folder** The child IGA folders should appear together in the repository listing.
Step 2	**Add the IGA fields as columns** Include Title, Agency, Start Date, Expiration Date, Contact Name, Contact Email, and Contact Phone.
Step 3	**Save the column configuration** Give the saved view a recognizable name such as IGA Inventory.
Step 4	**Sort and filter in Laserfiche** Answer routine questions by agency, expiration date, contact, or other indexed values without creating a separate spreadsheet.

The saved column view functions as a working IGA inventory inside Laserfiche

Export for Meetings or Other Reporting

When a council meeting, management request, or offline review requires a spreadsheet, export the repository listing with the saved columns. The spreadsheet is a reporting copy; Laserfiche remains the working source for the agreement folders and documents.

Name	Title	Agency	Start Date	Expiration Date	Contact Information	Template	Creation date	Last modified	Pages
Dispatch	Dispatch Services	Local County 911	7/1/2026	6/30/2028	Local County 911 Director	Intergovernmental Agreement (IGA)	7/13/2026 9:19:05 AM	7/13/2026 9:41:53 AM	
EMS	Emergency Medical Services	Pooled EMS Agency	7/1/2026	6/30/2027	EMS Company Admin VP	Intergovernmental Agreement (IGA)	7/13/2026 9:19:49 AM	7/13/2026 9:42:25 AM	
Law Enforcement Patrol #1	Law Enforcement Patrol #1	County Sheriff	7/1/2022	6/30/2030	Sheriff Brody	Intergovernmental Agreement (IGA)	7/13/2026 9:19:22 AM	7/13/2026 9:34:47 AM	
Law Enforcement Patrol #2	Law Enforcement Patrol #2	Neighboring City	7/1/2024	6/30/2030	Chief Atkins	Intergovernmental Agreement (IGA)	7/13/2026 9:19:35 AM	7/13/2026 9:35:37 AM	
School Resource Officer #1	School Resource Officer Middle School	Neighboring City	7/1/2024	8/31/2026	Chief Atkins	Intergovernmental Agreement (IGA)	7/13/2026 9:18:46 AM	7/13/2026 9:40:08 AM	
School Resource Officer #2	School Resource Officer High School	Neighboring City	7/1/2018	8/31/2025	Chief Atkins	Intergovernmental Agreement (IGA)	7/13/2026 9:18:54 AM	7/13/2026 9:39:33 AM	

Example spreadsheet exported from the demonstration IGA listing

Operational practice: Update the Laserfiche folder fields when information changes, then create a new export when needed. Avoid maintaining a second master inventory that can drift out of date.

EXTEND AND GOVERN THE SOLUTION

Add Automation After the Foundation Is Working

The folder structure, template, and saved columns provide immediate value without requiring automation. After the municipality confirms that the information is complete and consistently maintained, optional capabilities can reduce additional manual work.

Workflow Reminders

Laserfiche Workflow can evaluate IGA dates and notify responsible staff before an agreement expires or requires review. Define the notification schedule, recipient, escalation path, and method for documenting the decision. Review renewal and termination terms before relying on a single expiration date.

Smart Fields Assisted Metadata

Smart Fields can analyze an agreement and propose values such as title, agency, dates, and contact information. Staff should review the values before the record is finalized. Workflow can then copy approved document values to the parent IGA folder used by the saved column inventory.

Licensing and usage note: Smart Fields requires the Laserfiche Cloud Professional tier. Additional charges may apply based on overall Smart Fields usage. Confirm current licensing, included usage, and anticipated document volume before enabling the capability.

Human review: Dates, renewal provisions, notice requirements, termination terms, and contact information should be verified by authorized staff. Automated extraction supports the process but does not replace administrative or legal review.

Records Security and Retention

- Confirm the authoritative copy and the applicable record series with the records officer.
- Apply role-based access and address confidential or exempt information according to policy.
- Keep amendments, renewals, extensions, notices, and termination records connected to the IGA.
- Document the cutoff event, legal holds, review requirements, and authorized disposition process.

Implementation Checklist

- Pilot the design with five or six active agreements.
- Decide which dates control reminders, review, and retention activities and who can edit folder fields.
- Verify the template fields, folder naming, saved columns, sorting, filtering, and export.
- Assign responsibility for creating folders and maintaining metadata.
- Test security and retention, train users, and establish a periodic review for missing or aging information.

Resources and Next Steps

Oregon Revised Statutes Chapter 190 - Cooperation of Governmental Units
Oregon Revised Statutes Chapter 192 - Records Public Reports and Meetings
Oregon State Archives - Records Management and local government retention schedules

REQUEST A LASERFICHE DEMONSTRATION OR CONSULTATION

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Product information in this guide was prepared using current public Laserfiche materials and Nine Peaks Solutions implementation experience. Capabilities, packaging, availability, and subscription allowances may change and should be confirmed for the selected offering.

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