Public Record Request Demo

## Scenario

This demo begins with a community member requesting access to a city record. The request is sent to the city clerk’s office, then assigned to the relevant department for record retrieval. The city worker will use Laserfiche to search for the requested document, redact any sensitive information and then deliver it to the requester. The requester will be able to access content using WebLink.

Record Delivery

Verify Record

Record Retrieval

Department Assignment

Records Request

## Preparing the demo

Web Access or Desktop Client - Clara Clerk/c

Outlook

Forms - Laserfiche/l

WebLink in Chrome > Record Request Folder > Public Portal

Pick out one of the City Records files and remember its Record ID shown in the column view to fill out the form later on in the process.

# Running the demo

## Records Request

|  |  |  |
| --- | --- | --- |
| Step | Action | Points |
|  | In browser, open the City Website from the Records Request folder on the bookmarks toolbar.  Click on Records Request (not City Records!) | * Forms was published online and made available to the public * Links to Laserfiche forms can be integrated into existing websites |
|  | Fill out the form (Choose Email as preferred method for delivery)  Click **Submit** | * Show FAQ Tab and discuss its benefits * Talk about personalized message |
|  | Click on Return to Inbox  Click on the **Available Tasks** tab | * Explain how Forms Inbox organizes all tasks using dates and priority |
|  | Click on **Assign to me** either from a task preview or by checking the task and clicking the Assign to me icon. | * Talk about Team functionality |
|  | Return to the My Tasks Tab and select Department Assignment Task  Complete the form by selecting the appropriate department |  |
|  | Open Outlook to check for email notification  Click on the link to go the task | * Talk about the automated notification and how Laserfiche can attach a link to a task in Forms Inbox for convenience |
|  | Click on the link to the repository  If necessary log in as Clara Clerk/c | * Talk about how Laserfiche can attach a link to a repository for convenience |
|  | Search for the required document  Open the document and redact some information | * This is a good opportunity to show off Laserfiche’s search functionality * This is a good opportunity to talk about annotations and security in Laserfiche |
|  | Copy document’s Record ID and Paste it into the Record Retrieval Form  Click **Records** **Found** | * The Record Request has been saved into **\0C2 City Records\0C2G Public Record Requests** |
|  | Open Outlook to check for email notification  Click on the link to go to Public Portal | * Good opportunity to explain what Public Portal does and how it is organized to access read-only record(s) * Talk about redactions if there are any |

## Forms Reporting Tools (Optional)

Chrome > Record Request Folder > **Operational Dashboard / Performance Dashboard**

If you want to show Operational Dashboard, make sure you change the time settings to **8/9/2016**. Otherwise, all of the running instances will be past due.

* **Operational Dashboard**
  + How many record requests are in progress? What stages are they at?
  + Which city clerk has the heaviest workload? The most overdue tasks?
* **Performance Dashboard**
  + How long does it take to fulfill a public records request on average? Which stage takes the longest?