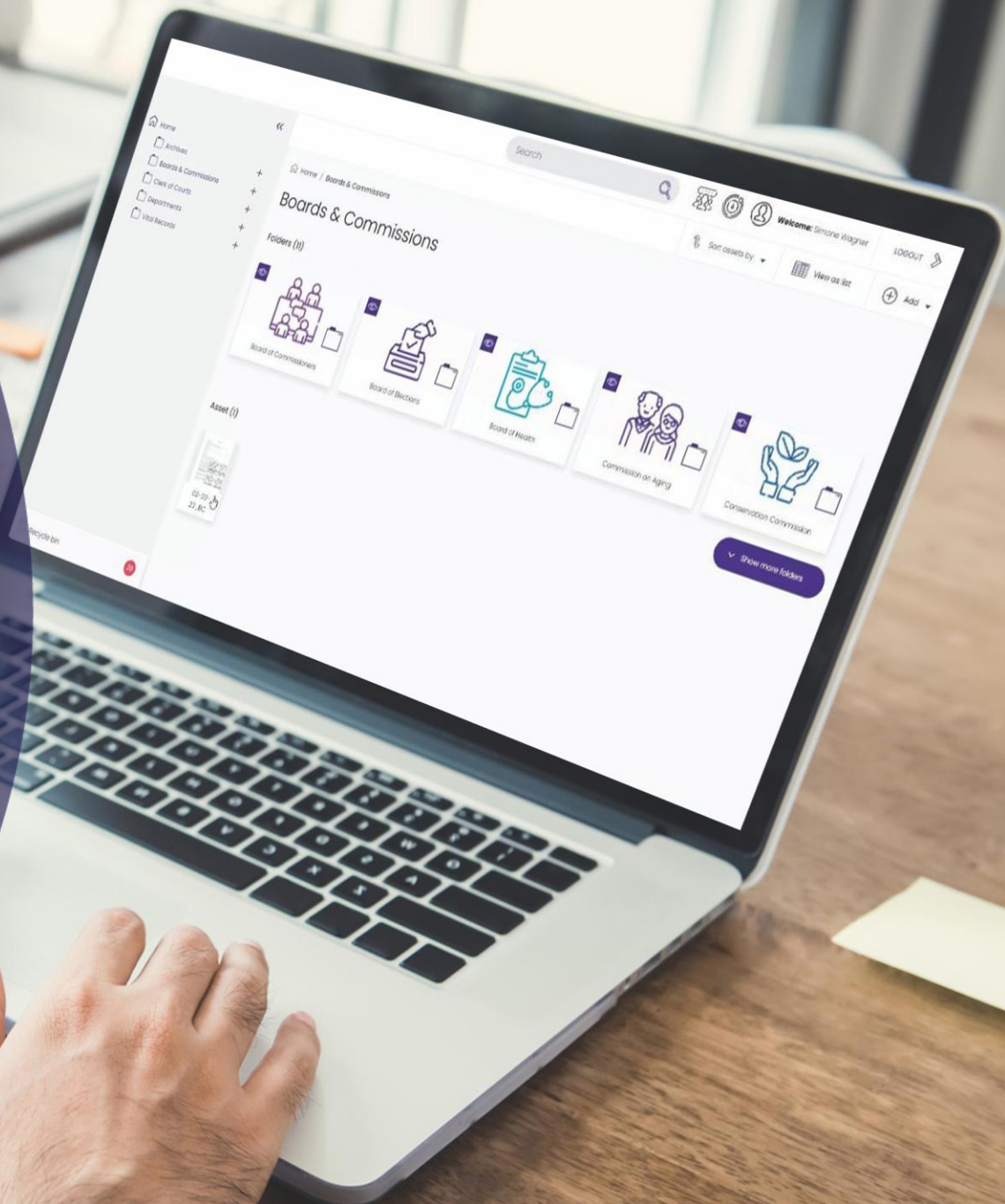


Modernizing digital records capture & access for boards & commissions

June 15, 2023



Welcome



Aubrey Shanahan
Onboarding Specialist
Preservica



Ashley Large
Archivist & Records Manager
Town of Bedford



Simone Wagner
Configuration Specialist
Preservica

Agenda

-  Local Government digital records challenges
-  Digital preservation at the Town of Bedford
-  Local Government Application preview
-  Join our Local Government Application working group
-  Questions & how to get started

Growing volumes of permanent & long-term digital records



Vitals

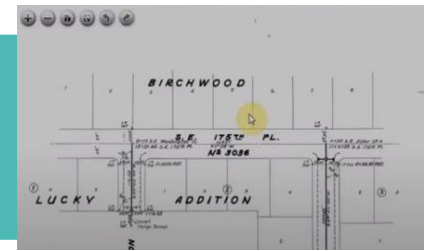
Historical



Elected officials



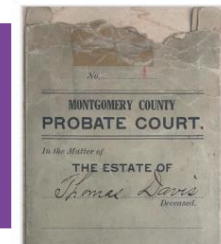
Planning & infrastructure



Real property



Court records



Boards & Commissions



Challenges of managing public records of Boards & Commissions



How do I easily capture records from departments?

How do I meet my mandate to publish public records online?



How can I save money by bringing all this together into one system?

How can I easily add metadata for better discoverability?



How can I save time by streamlining all these different workflows?

How do I quickly find records for FOI and public requests?

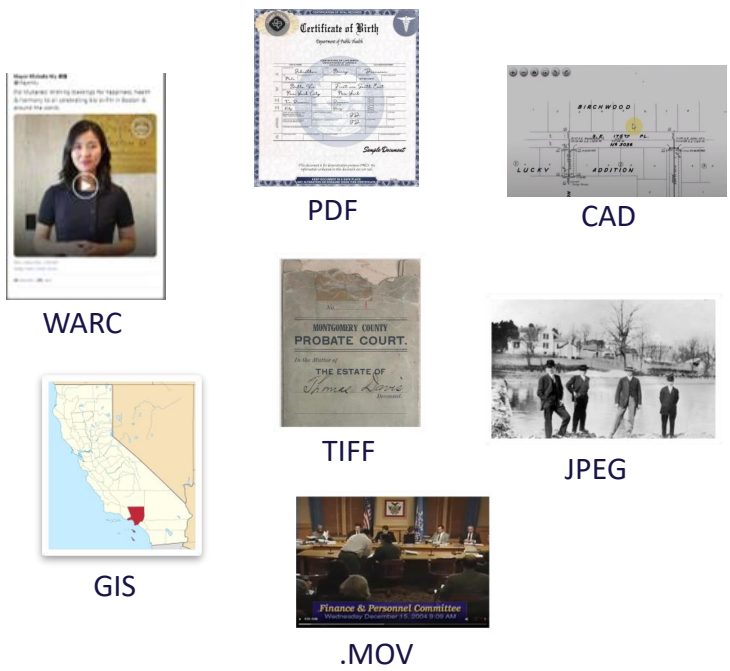


How do I ensure long-term integrity & access to permanent digital records?

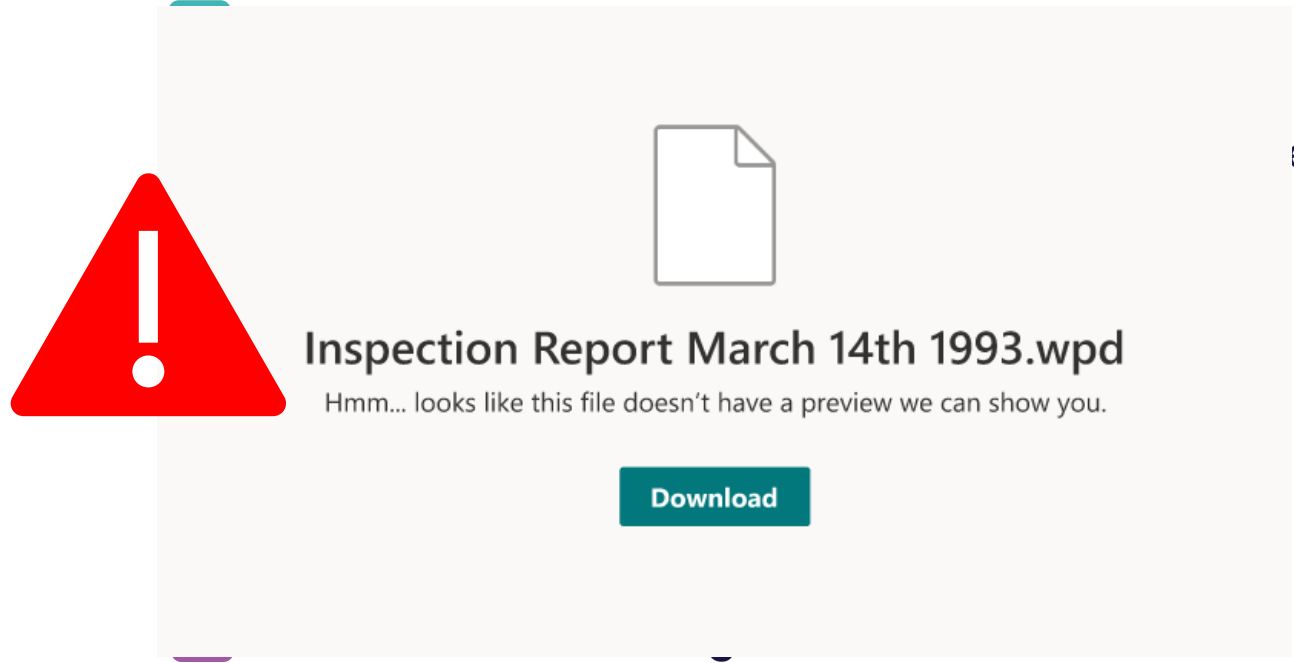


Challenges of ensuring the long-term accessibility of digital records

Increasing variety & complexity of formats



Risks to digital records



Digital preservation ensures the records you need to retain can always be quickly found, actioned and trusted when required

- Automatically maintain files in readable formats
- Ensure integrity & authenticity with checksums
- Store, preserve, organize and share in one place



Readability



Trustworthiness



Discoverability



TOWN OF
BEDFORD
MASSACHUSETTS

Encouraging Digital Preservation with Preservica

Ashley Large, MLS, CA, DAS

Town Archivist and Records Manager

Town of Bedford, MA, USA



TOWN OF **BEDFORD** MASSACHUSETTS

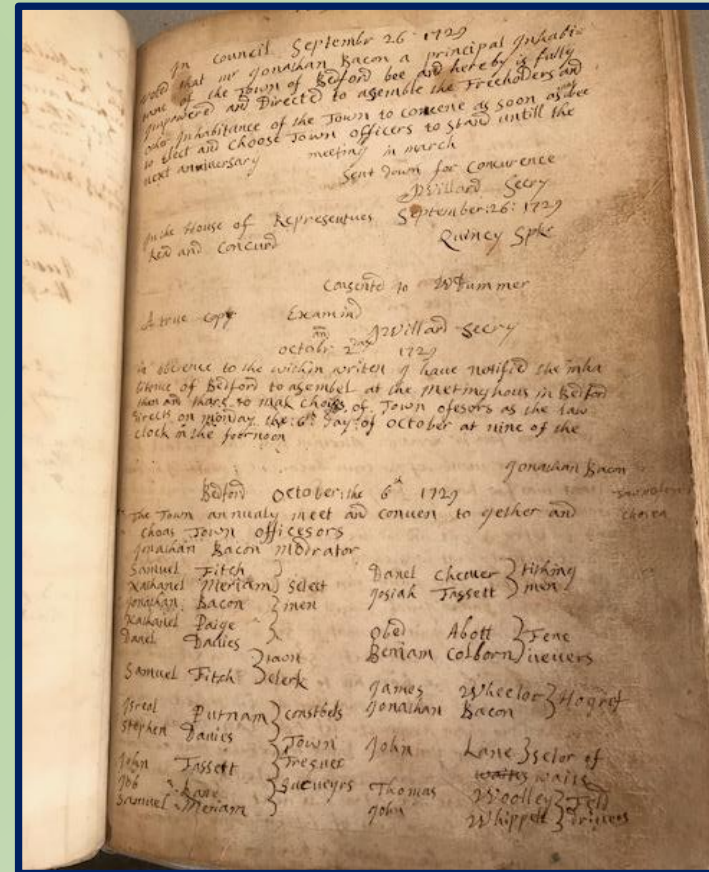
- Population ca. 12,500
- Founded in 1729, Revolutionary War history
- Open Town Meeting form of government
- Select Board, Town Manager, Town Departments, and Boards/Committees



TOWN OF BEDFORD

MASSACHUSETTS

- Ca. 750 ft² of secured, climate-controlled vault space
- Physical and digital administrative records, microfilm, bound volumes, rolled/flat plans/maps (2,500+)
- Vitals (1720s-current), legal records, taxes/assessments, Town Manager's admin files, financial records, annual reports, street lists, meeting minutes, early church records, and more





TOWN OF **BEDFORD** MASSACHUSETTS

Current Projects

- Meeting minutes
- Building Plans Pilot Project
- Miscellaneous records as they come in via email, done piecemeal
 - Trial runs of External Submissions tool

Our Future

- A regular workflow supported by departmental records management plans (in process)
- Submissions from each department on a regular interval
- Appreciation of permanent digital records and why digital preservation is important
 - Enhanced participation by staff

External Submissions Tool

- No file hosting service needed
- Direct to the repository after approval
- No email attachment size limitations
- Prompts creators to submit
- User-friendly interface
- Saves a lot of time in communication and logistics – quicker turnover
- Example: Commitment Books

RealEstate_TaxCommitment_FY2020.pdf

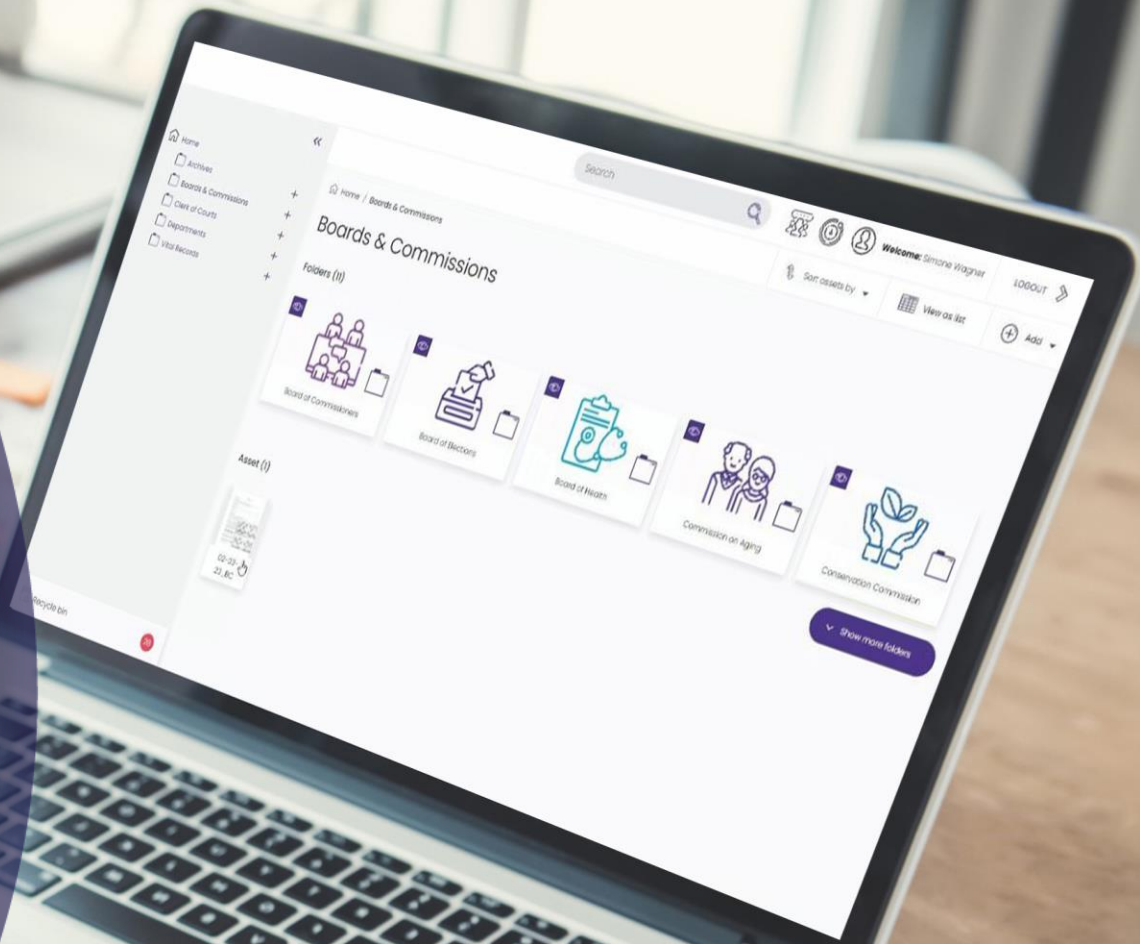
4 of 1598 Automatic Zoom

STATE	COUNTY	TOWN	PARCEL IDENTIFICATION	OWNER NAME	ADDRESS	PROPERTY DESCRIPTION	ASSESSED TAX	TAX CLASS	UNITS	CODE	DESCRIPTION	MUNICIPAL	TAXABLE STATUS	DATE	TAX AMOUNT
MASSACHUSETTS	MIDDLESEX	BEDFORD	62-77B	DAY, GEORGE W & DIANNA, TRS	12 HIGHLAND RD	CUTLER STREET	225400	109 I	1	SCHOOL - RS	677,500	677,500	T	1/01/19	677,500
MASSACHUSETTS	MIDDLESEX	BEDFORD	62-77B	DAY, GEORGE W & DIANNA, TRS	12 HIGHLAND RD	CUTLER STREET	225400	109 I	1	SCHOOL - RS	677,500	677,500	T	1/01/19	677,500
MASSACHUSETTS	MIDDLESEX	BEDFORD	62-77B	DAY, GEORGE W & DIANNA, TRS	12 HIGHLAND RD	CUTLER STREET	225400	109 I	1	SCHOOL - RS	677,500	677,500	T	1/01/19	677,500
MASSACHUSETTS	MIDDLESEX	BEDFORD	62-77B	DAY, GEORGE W & DIANNA, TRS	12 HIGHLAND RD	CUTLER STREET	225400	109 I	1	SCHOOL - RS	677,500	677,500	T	1/01/19	677,500

A NEW ready-to-go application for US Local Government



Simone Wagner
Preservica



Cut days of work to minutes with pre-configured templates and workflows



Boards & Commissions



Court records



Archival



Vitals



Land and property

...and more.

Folder hierarchies

- Archives +
- Boards & Commissions -
 - Board of Commissioners -
 - Meeting Minutes +
 - Meeting Recordings +
 - Ordinances +
 - Reports +
 - Resolutions +
 - Board of Elections +
 - Board of Health +
 - Commission on Aging +
 - Conservation Commission +
 - Library Board +
 - Licensing Board +
 - Parks & Recreation Board +
 - Planning Board +
 - School Board +
 - Zoning Board +
- Clerk of Courts +
- Departments +
- Vital Records +

Security tags & Roles

Roles Security Tags

Choose security tag
Select the security tag you would like to configure. Clerk_of_court + Create a Security Tag

Roles - Clerk_of_Court
You are viewing the Clerk_of_court security tag's roles + Create Role

Role Name	Read Metadata	Update Metadata	Delete Entity	Read Content	Insert Content	Read Permission	Change Permission	Update Retention Policy	Actions
Assessor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Clerk of court access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Clerk of court admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete

Tailored onboarding

Welcome to the Local Government Application!

Setup Add Users Add Records Publish

We've already setup your folder hierarchy, security, roles, and metadata templates.

Click Add Users to continue setting up your site.

Add Users

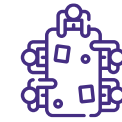
Metadata for record types

Metadata fields setting

Manage descriptive metadata here to apply to your assets and folders later

Meeting Name	Short Text	▼
Meeting Date	Date	▼
Document Type	Short Text	▼
Agenda ID	Short Text	▼
Agenda Items	Short Text	▼
Attendees	Short Text	▼
Meeting Type	Short Text	▼
Project Type	Short Text	▼
Topics	Short Text	▼

Modernize the way you meet mandates for preserving & publishing public records



Boards & Commissions



Sandra
Clerk of
Boards

Upload public records using easy "drag and drop"

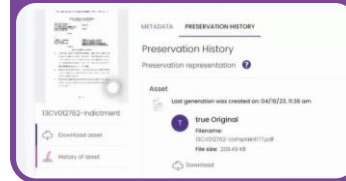


Ben
Records Manager

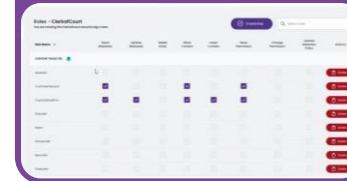
Quickly manage submissions and organize by department



Automatically preserve to ensure permanent access



Publish records to your own branded portal with a single click



Jo
Citizen

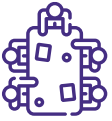
Quickly find and view public records



Join our Local Government working group, and get hands-on with this new application



Boards & Commissions



Court records



Archival



Vitals



Land and property

...and more.



Start your journey today!

Explore digital preservation made simple and fun!

Next steps...



Join our Local Gov working group & get hands-on



See you at the NAGARA CONFERENCE in CINCINNATI –

- Tuesday, July 17 - 1:00pm – [Modernize Preservation and Access to Government Records](#)
- Wednesday, July 18 - 2:20pm – [Deliver a unified M365 strategy across the records lifecycle](#)
- Friday, July 19 - 9:00am – [Digitize Once, Preserve Forever. Establishing workflows to protect investments in digitizing analog content](#)



Talk to our experts about your digital preservation requirements



Community Hub – learn, share, collaborate



Preservica



Scan to sign up for our Local Government Application working group





Any questions?

Thank you



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preservica.com
starter.preservica.com
developers.preservica.com



[linkedin.com/company/preservica](https://www.linkedin.com/company/preservica)



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[@dPreservation](https://twitter.com/dPreservation)



Preservica

