Converting Rancho Murieta Community Services District's Escrow Files From Physical to Digital

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Advantages to Going Digital

More Organized
- Files can be found and appended much more efficiently.
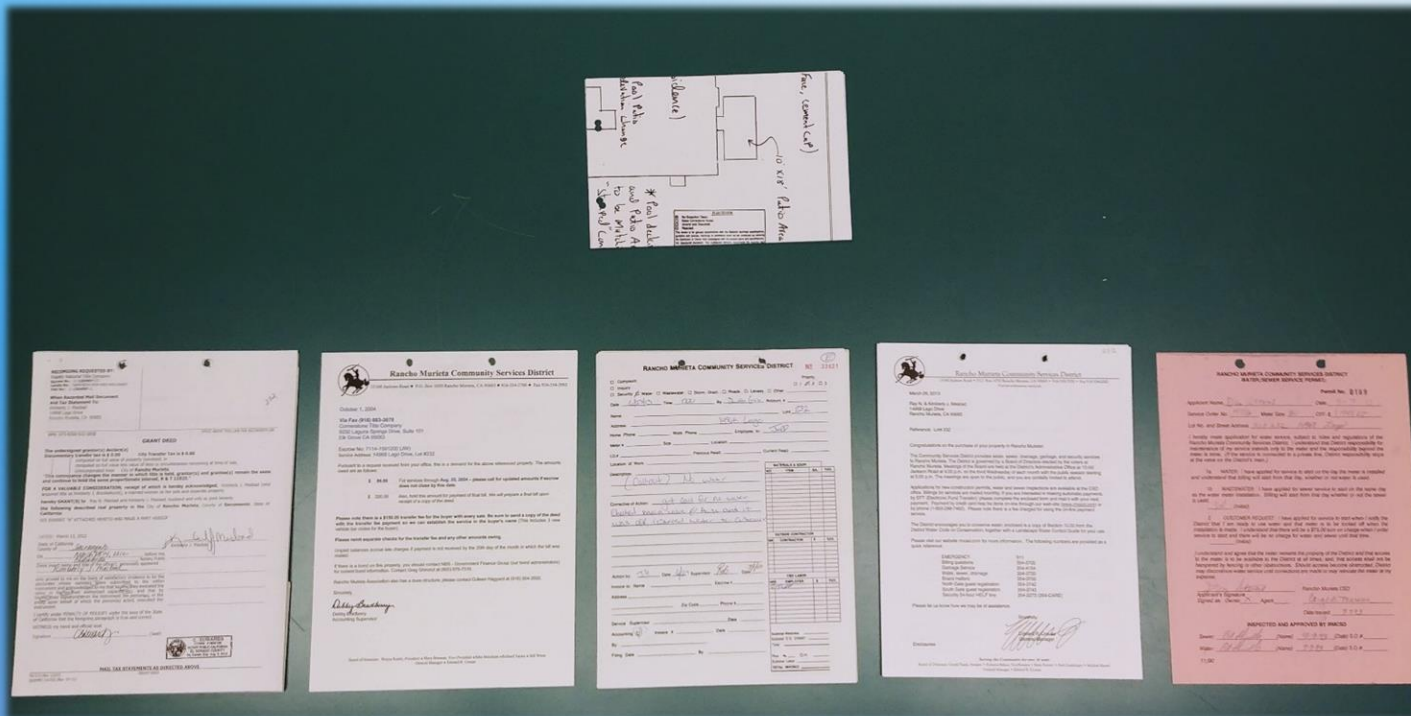 - Files are indexed by their file type and chronologically.

All Files are Online
- Workers in the field will have access to files from any location with cellular service.
- Files can be accessed in the field in a matter of minutes as apposed to returning to the District office.

How we Convert to Digital
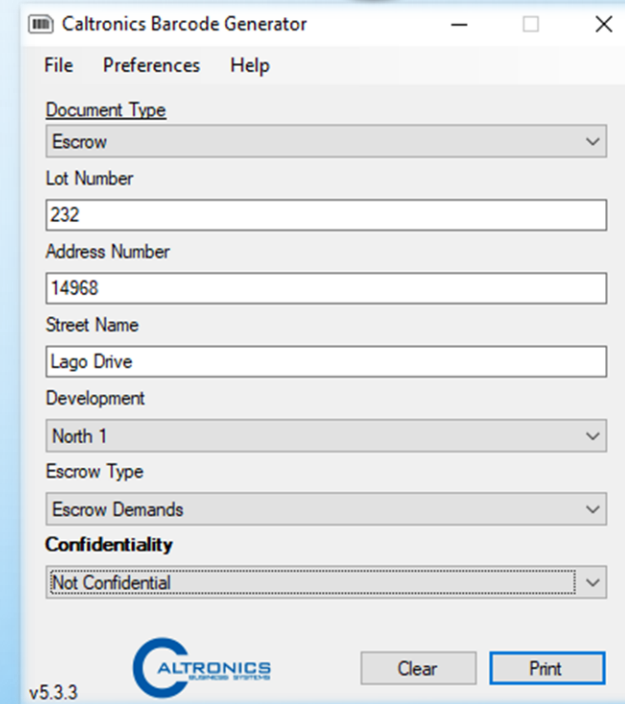
Step 1:

- Separate and index each file into the following categories:

  - Grant Deed
  - Escrow Demands
  - Water & Sewer Permit
  - Work/Service Order
  - Recycled Water
  - Other

How we Convert to Digital

Step 2:

- Input the necessary information into the Barcode Generator to generate the barcodes for the file.
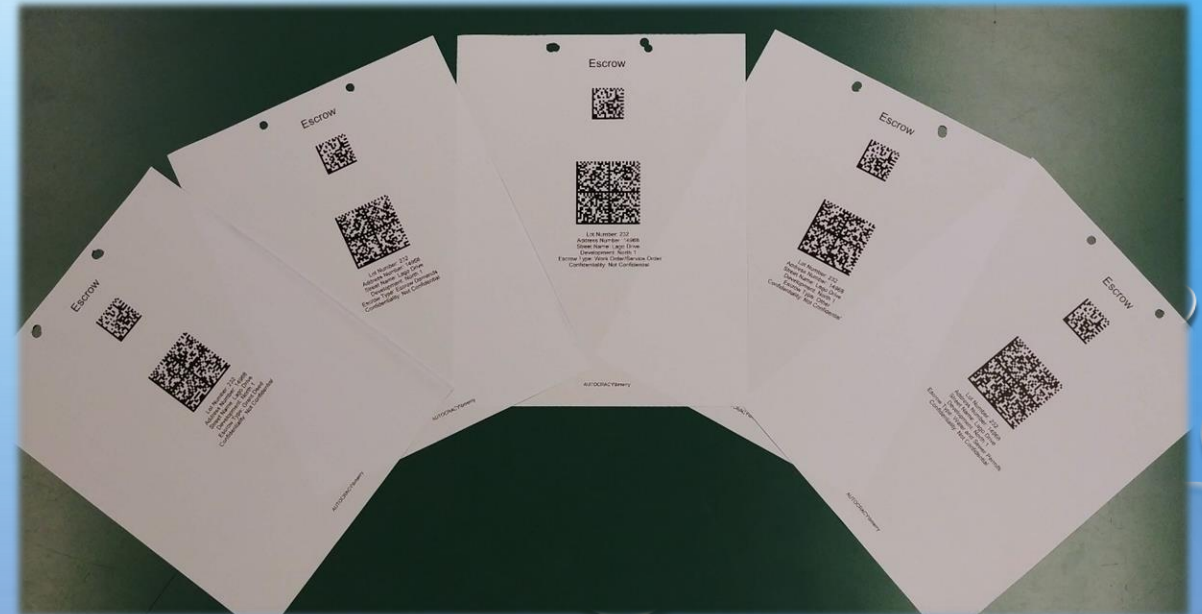
Step 3:

- Place each barcode page with the corresponding documents from Step 1.

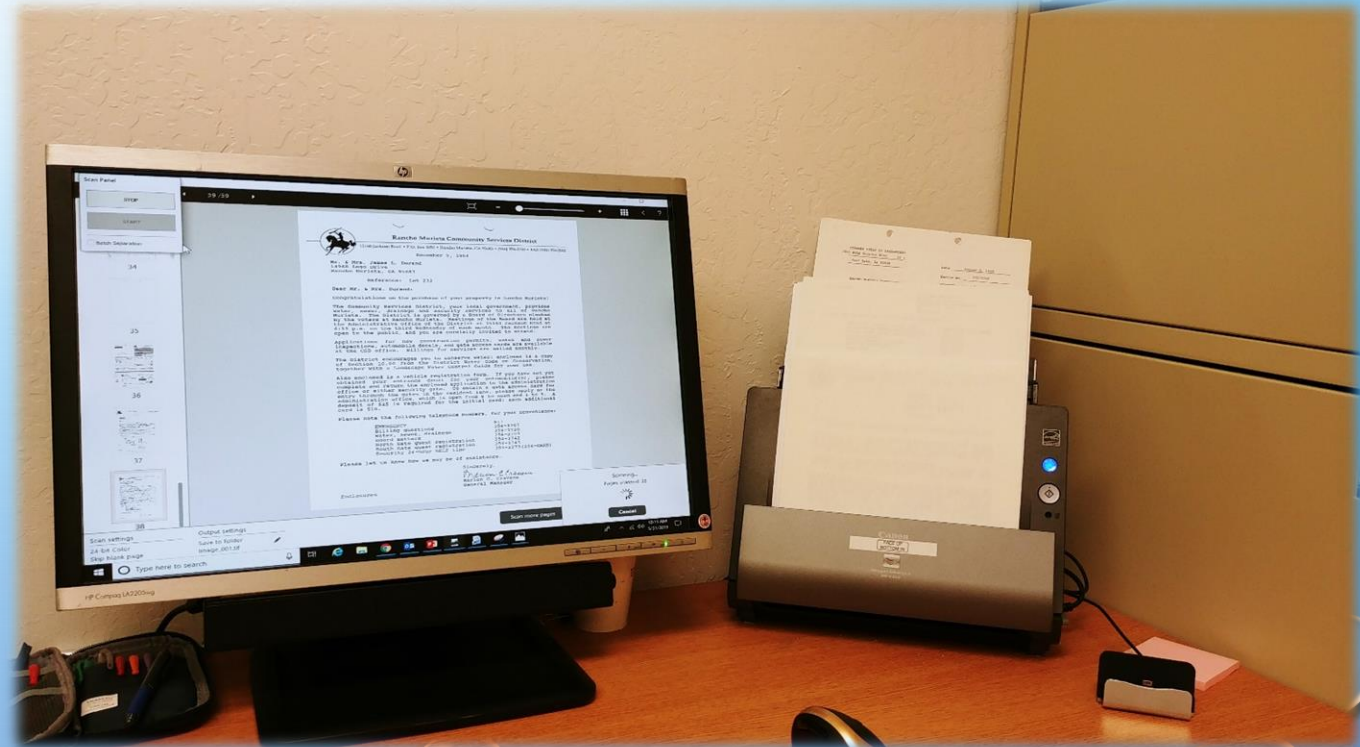 ** These Barcodes allow the scanning software to organize each set into their own file.*

How we Convert to Digital

Step 4:

- Scan the files with the Barcodes and upload them into the Global Search program.
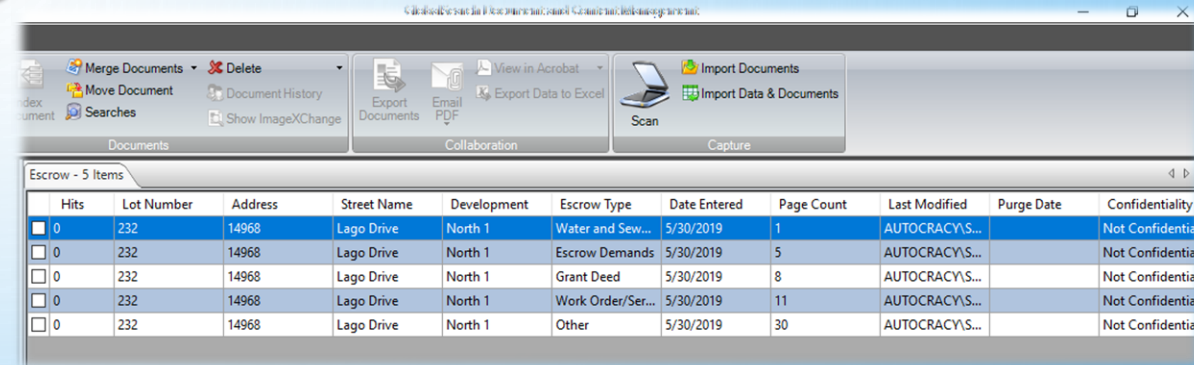
Step 5

- Review each document to ensure that the scan was successful
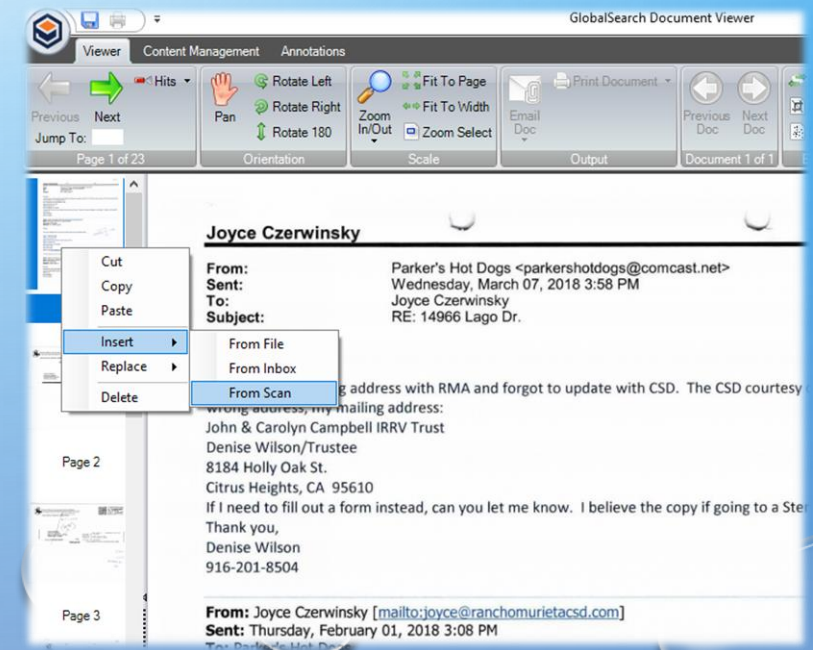
Appending New Documents to the Existing Files

1. Feed the document(s) into the scanner.
2. Select and open the desired file in which you would like to place the document(s).
3. On the left side, right click on the first document on the left side, go to *"Insert"* and select *"From Scan"*
4. Once the document(s) have been scanned, inspect the document and hit Save.
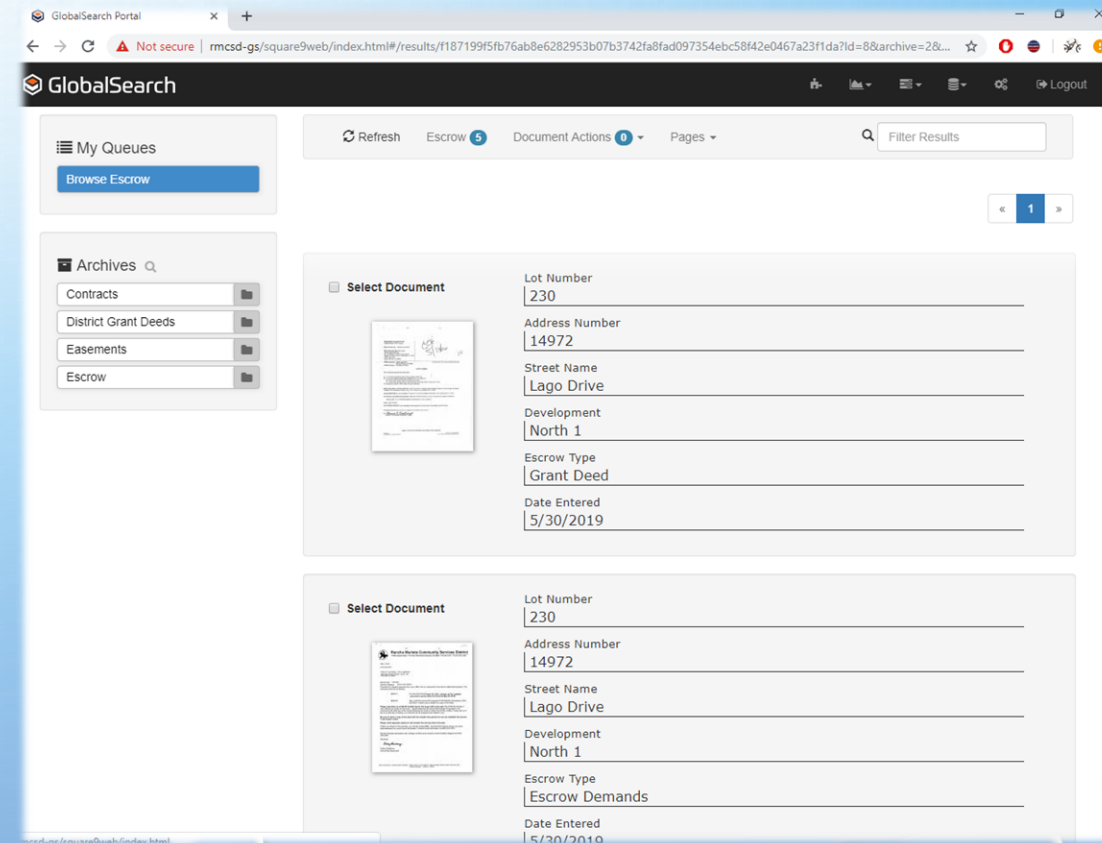
Accessing the Files From Anywhere

All documents scanned into the *Global Search* data base can be accessed by any employee of Rancho Murieta CSD with any device connected to the Internet.

Step 1:

- Open the preferred Internet Browser and open the link for the online database.

Accessing the Files From Anywhere

Step 2:
- Log into the server using your username and password.
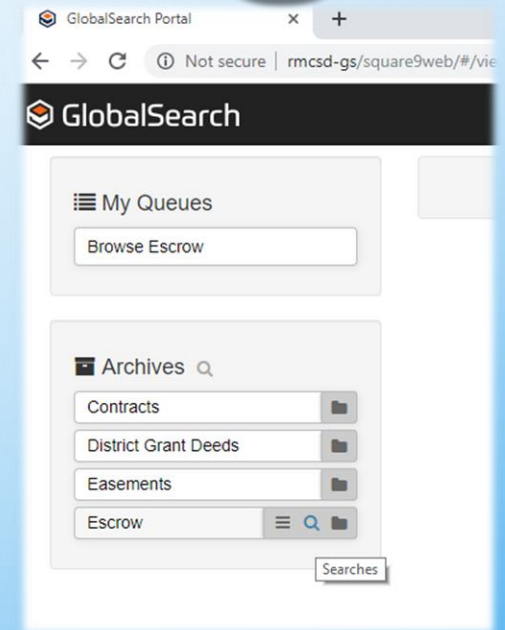
Step 3:
- Go to "*Escrow*" and click on the magnifying glass in order to search for a file.

Step 4:
- Enter in the desired Lot Number and or Address and select *"Run Search"*.

Step 5:
- Double click on the desired file to open it.

The Long Term Advantages of Converting to Digital

- Physical Storage space is freed up.

- Rancho Murieta CSD is able to operate in a more organized and efficient manner.

- Rancho Murieta CSD Field workers can now execute their job better and faster while using less resources *(gas and time)* than before; giving direct benefits to the homeowners of Rancho Murieta.

What is Next?

- Finish scanning the escrow files.

- Shred the physical Escrow files and clear out the file cabinets.

- Create detailed instructions and/or instructional videos to teach Rancho Murieta CSD employees how to use the program.

Questions?