The background is a light blue gradient with several realistic water droplets of various sizes scattered across it. The droplets have highlights and shadows, giving them a three-dimensional appearance.

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.

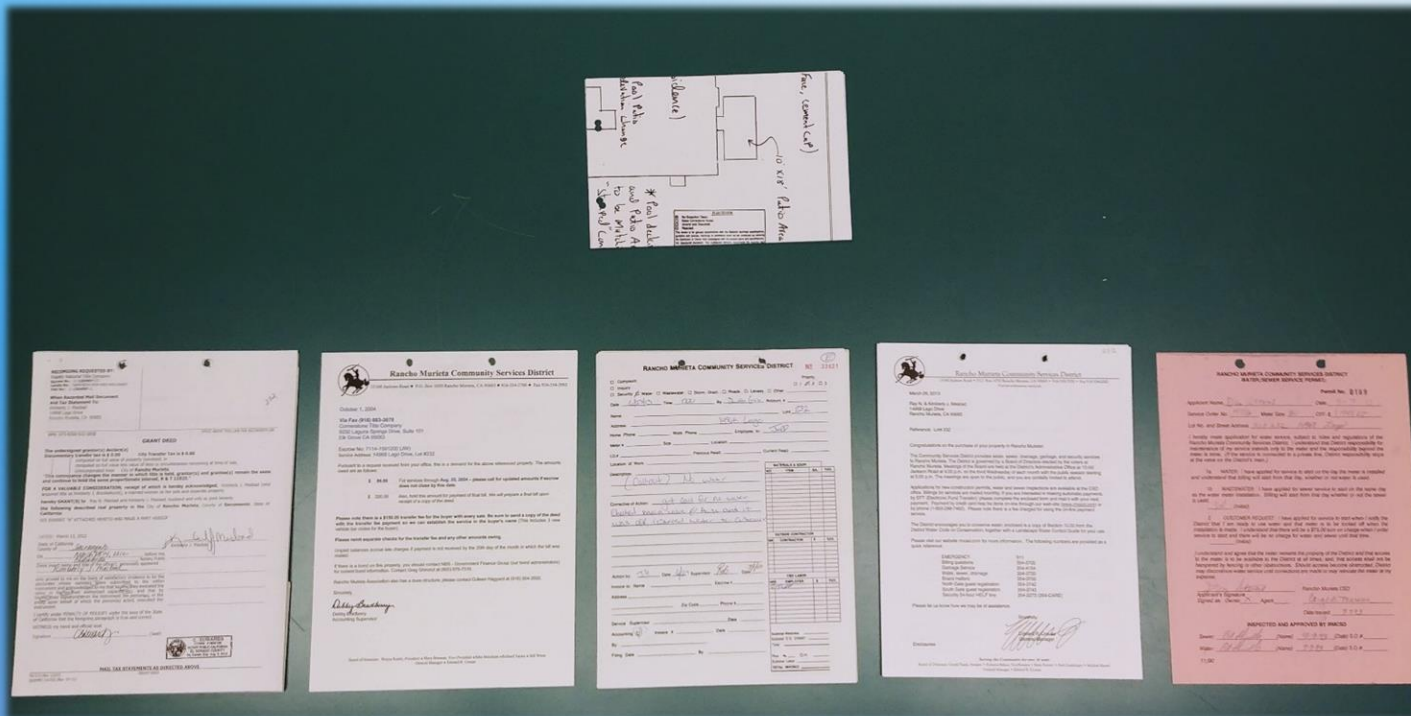
All Files are Online

- 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:

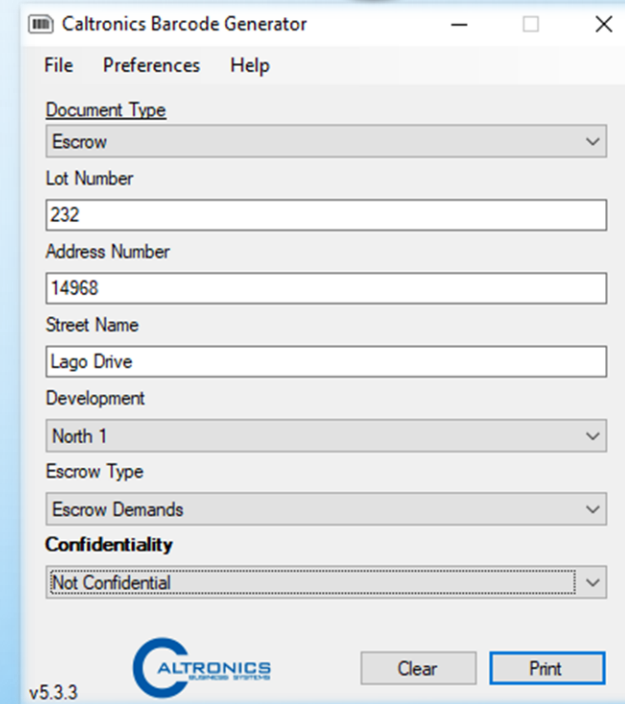
- Separate and index each file into the following categories:
 - Grant Deed
 - Escrow Demands
 - Water & Sewer Permit
 - Work/Service Order
 - Recycled Water
 - Other



How we Convert to Digital

Step 2:

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

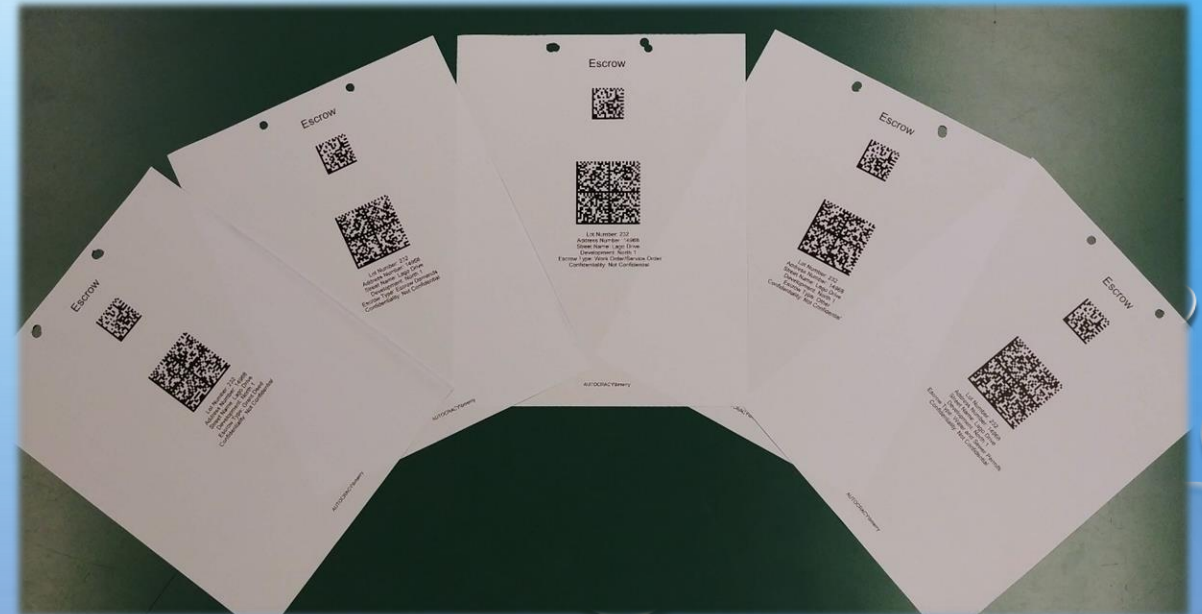


The screenshot shows the 'Caltronics Barcode Generator' application window. It features a menu bar with 'File', 'Preferences', and 'Help'. Below the menu is a 'Document Type' dropdown menu set to 'Escrow'. There are several text input fields: 'Lot Number' (232), 'Address Number' (14968), 'Street Name' (Lago Drive), and 'Development' (North 1). There are also two more dropdown menus: 'Escrow Type' (Escrow Demands) and 'Confidentiality' (Not Confidential). At the bottom right, there are 'Clear' and 'Print' buttons. The version number 'v5.3.3' and the 'ALTRONICS' logo are visible at the bottom left.

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.*



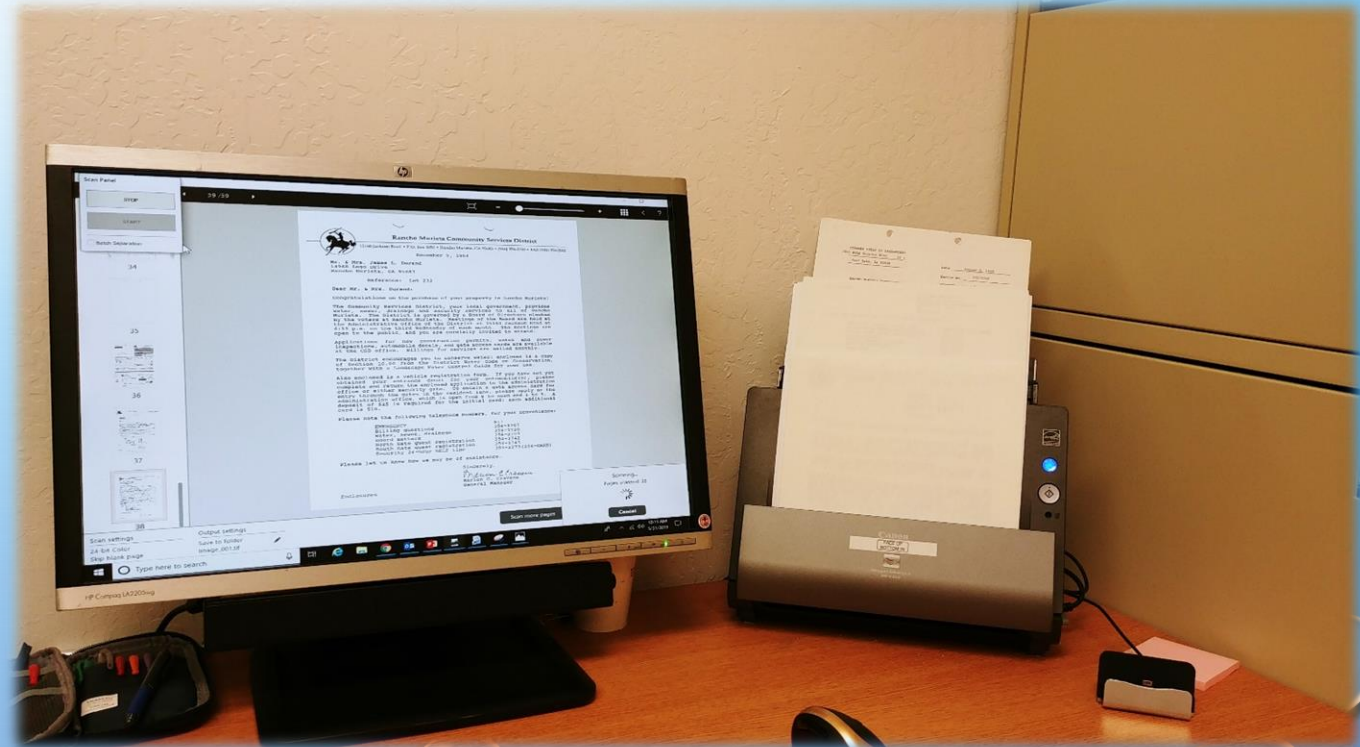
How we Convert to Digital

Step 4:

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

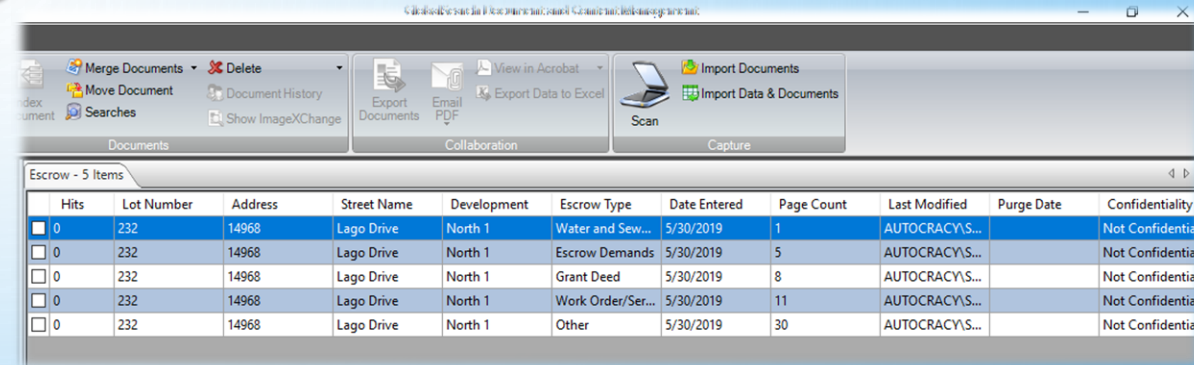
Step 5

- Review each document to ensure that the scan was successful



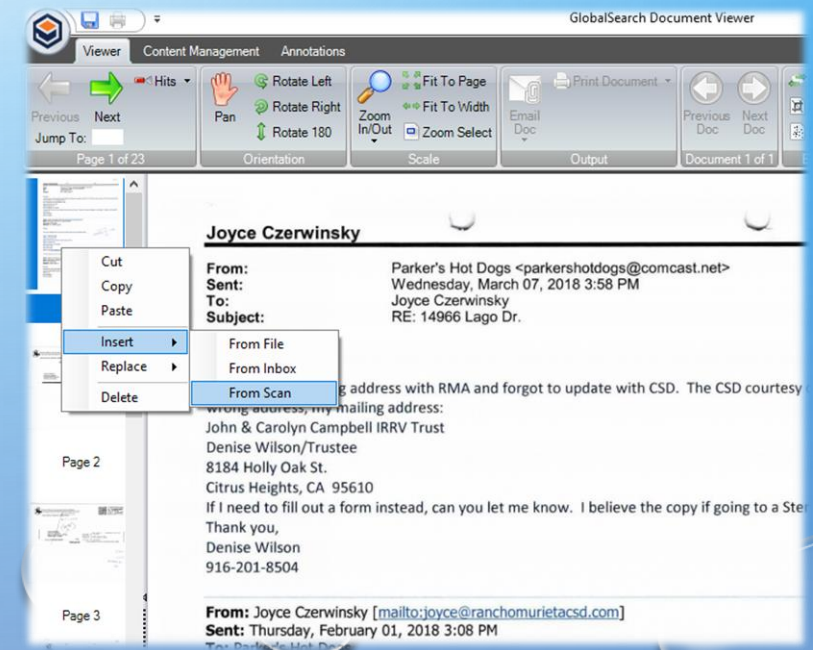
Appending New Documents to the Existing Files

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.



The screenshot shows a software interface with a menu bar and a table. The menu bar includes options like 'Merge Documents', 'Delete', 'Move Document', 'Document History', 'Searches', 'Show ImageXChange', 'Export Documents', 'Email PDF', 'View in Acrobat', 'Export Data to Excel', 'Import Documents', 'Import Data & Documents', and 'Scan'. The table below is titled 'Escrow - 5 Items' and contains the following data:

Hits	Lot Number	Address	Street Name	Development	Escrow Type	Date Entered	Page Count	Last Modified	Purge Date	Confidentiality
0	232	14968	Lago Drive	North 1	Water and Sew...	5/30/2019	1	AUTOCRACY.S...		Not Confidential
0	232	14968	Lago Drive	North 1	Escrow Demands	5/30/2019	5	AUTOCRACY.S...		Not Confidential
0	232	14968	Lago Drive	North 1	Grant Deed	5/30/2019	8	AUTOCRACY.S...		Not Confidential
0	232	14968	Lago Drive	North 1	Work Order/Ser...	5/30/2019	11	AUTOCRACY.S...		Not Confidential
0	232	14968	Lago Drive	North 1	Other	5/30/2019	30	AUTOCRACY.S...		Not Confidential

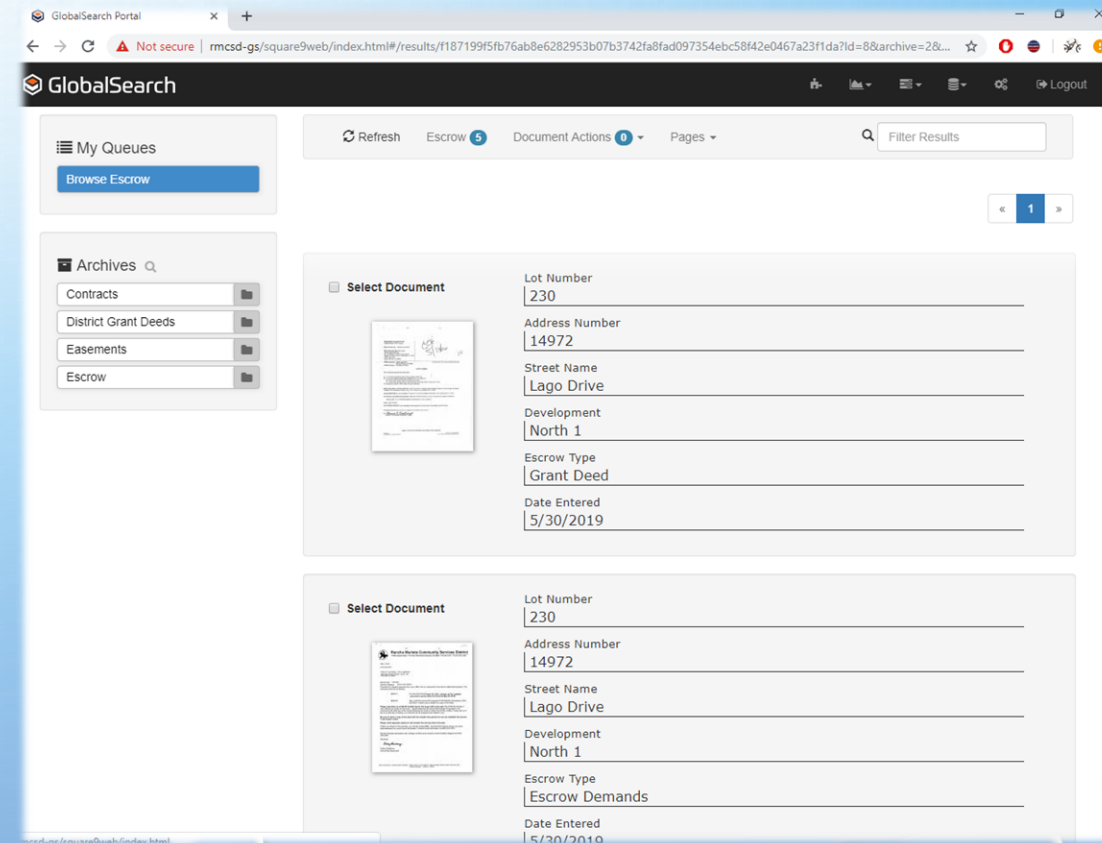


Accessing the Files From Anywhere

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.



The screenshot displays the GlobalSearch Portal interface. On the left, there is a sidebar with 'My Queues' (Browse Escrow) and 'Archives' (Contracts, District Grant Deeds, Easements, Escrow). The main area shows search results for a document. The first result is a 'Grant Deed' with the following details: Lot Number 230, Address Number 14972, Street Name Lago Drive, Development North 1, Escrow Type Grant Deed, and Date Entered 5/30/2019. A second result is partially visible below, showing the same lot and address but with an 'Escrow Demands' type.

Accessing the Files From Anywhere

Step 2:

- Log into the server using your username and password.

Step 3:

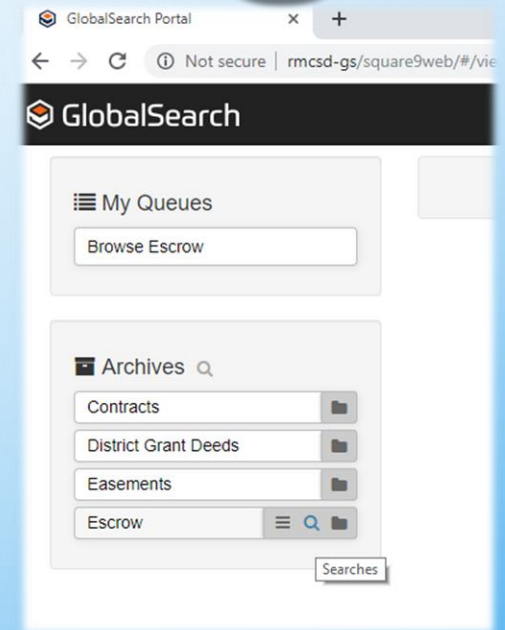
- Go to “*Escrow*” and click on the magnifying glass in order to search for a file.

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.

A screenshot of a web form titled "Escrow: Searches". The form contains several input fields: "Lot Number:", "Address Number:", "Street Name:", "Development:" (with a dropdown arrow), "Escrow Type:" (with a dropdown arrow), "Date Entered:", "Page Count:", "Last Modified:", and "Keyword:". At the bottom right of the form, there are two buttons: "Cancel" and "Run Search".

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.

The background is a light blue gradient. There are several realistic water droplets of various sizes in the corners: top-left, top-right, and bottom-right. The word "Questions?" is centered in a black serif font.

Questions?