



STAFF REPORT

SAUSALITO CITY COUNCIL

AGENDA TITLE:

Authorization to enter into a lease agreement for a records management system (DocuWare) from Scott's Technology

RECOMMENDED MOTION:

Authorize the City to enter into a lease agreement for the records management software, DocuWare, which is integrated with the City's photocopier

SUMMARY

For some time, staff has hoped to bring on line a records management system. As a part of an integrated records management system, the City Council recently adopted a Records Retention Schedule. All the while, staff was also investigating the different records management software programs available in order to achieve an all inclusive records management system where documents, prior to destruction, could be scanned, archived and still be easily retrieved by anyone.

At the direction of Council, an initial list of documents slated for destruction was recently brought to them and approved with modifications. This was only an initial list of non-historical type documents. The next round of document destruction will include documents of an historical nature. However, before any of these documents can be destroyed, they must first be scanned and indexed pursuant to Council's direction.

With the authorization to lease DocuWare, staff is ready to begin the immediate scanning of documents and preparing them for archival.

BACKGROUND

In August, 2005, staff advertised bid requests for photocopiers. In October, 2005, Council approved the lease of a Savin photocopier. At that time, the Staff Report noted, "The specifications for a replacement copier included digital technology advancements that will allow the new copier to also be used to scan, FAX and email documents, as well as to perform more complex document copy production. The machine will also have the capability to integrate various documents produced in different software format into a single document. . . . There is clearly a benefit in

Item #: 6C
Meeting Date: 5-6-08
Page #: 1

increasing capabilities of the copier, which will result in work efficiencies and much improved document management potential.”

It was further determined that Scott’s Technology had the ability to incorporate a records management software system into the photocopier capabilities. Scott’s Technology offered a software system that could scan documents and allow for full text indexing to automatically categorize, index and store any type of document. Additionally, the software was network compatible and also allowed for access through the internet.

Following Council approval of the photocopier, staff met with the OMIT Committee to see a demonstration of the records management product, DocuWare.

Based on the conceptual approval of the OMIT Committee, staff had intended to add the DocuWare system onto the existing photocopier lease as was recommended by Scott’s Technology. Staff was unable to follow through on this plan at that time. Finally, in February of this year, Scott’s was contacted in order to finally complete the deal.

As staff continued to follow through on what had been in progress, the implementation team from Scott’s Technology met with the Deputy City Clerk, the Administrative Services Manager and the City of Sausalito Technology Division throughout February and March of 2008 to design a secure and intuitive data management structure that will support the City’s Document Retention Schedule, accommodate multiple data formats, ranging from handwritten minutes to digital audio files and easily accommodate the document management needs of other departments as they adopt the use of this system.

Recognizing that DocuWare will only enable staff to successfully resolve both current and future document management challenges if it is intuitive and well planned from the beginning, the team focused not only on current needs and challenges but put particular emphasis on scalability, designing a system that will empower those who inherit our legacy. DocuWare leverages industry standard database engines, Oracle and SQL Server, and is therefore a product the City of Sausalito can look forward to using for many years to come.

As the planning stages moved forward, it was realized that too much time had lapsed since the inception of the photocopier lease, and Scott’s requested a separate lease for the records management software.

ISSUES

Without the records management system (DocuWare), we cannot proceed with the destruction of records, pursuant to the Records Retention Schedule and the desire of Council allow for destruction and yet to maintain historical documents.

Item #:	<u>6C</u>
Meeting Date:	<u>5-6-08</u>
Page #:	<u>2</u>

There is no available space for the storing of physical documents strictly for the purpose of historical documentation. Additionally, no new documents can be filed due to a lack of file cabinet space.

Worse yet, there have been times when the public has been turned away because staff did not know how or where to retrieve public documents.

FISCAL IMPACT

Once approval is granted by the City Council and issues with our network are resolved, the monthly lease will be \$866/month. Beginning in year two, an additional expense of \$450/month will be generated for a maintenance agreement, if we so opt.

In the 2007-08 IT budget, a line item appeared for \$10,800 to cover the costs for the first year of the DocuWare lease. However, due to the lateness of the purchase, this year's cost should not exceed \$3,500. The 2008-09 and the 2009-10 IT budget continues to show \$11,000 to cover the costs for the second and third years and the maintenance agreement.

To begin the process of archiving documents, staff intends to work in-house and make use of volunteers.

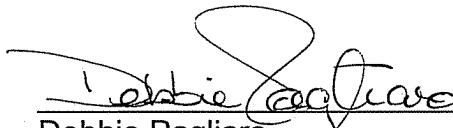
STAFF RECOMMENDATIONS

Staff recommends that Council approve the authorization to enter into a lease agreement for the records management software, DocuWare.

ATTACHMENTS

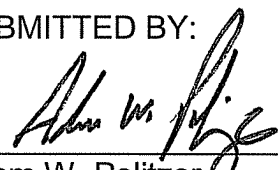
1. Proposal by Scott's Technology
2. Purchase Requisition
3. Draft Lease Agreement

PREPARED BY:



Debbie Pagliaro
Assistant to the City Manager

SUBMITTED BY:



Adam W. Politzer
City Manager

Item #:	6C
Meeting Date:	5-6-08
Page #:	3

Approved by:

Louise Ho
Finance Director

Item #: 6C
Meeting Date: 5-6-08
Page #: 4