



STAFF REPORT

SAUSALITO CITY COUNCIL

AGENDA TITLE:

Receive Update on the DocuWare Records Management System

RECOMMENDED MOTION:

Receive and file

SUMMARY and BACKGROUND

In late 2007, Council approved a Document Retention Schedule. At that time, Council directed staff to establish a way in which to scan and index documents of historical nature. Following that directive, staff researched different records management systems and returned to Council in May of 2008 for Council authorization to the lease a records management system – DocuWare. Council approval was received.

During 2009, staff was trained on the use of this software and began determining what storage classifications would work best for the documents to be scanned. During 2009, only new documents were scanned into the system.

Beginning this summer, and with the help of Administrative Intern David Weatherford, volunteers were recruited and began scanning historical documents. To date we have:

- City Council minutes from 1971 to present that have been scanned and indexed
- Ordinances from 1957 to present have been scanned, with over 50% of those having been indexed

The minutes from 1893 to 1970 were in sealed books and unable to be easily scanned. However, we were able to locate microfilm for those minutes and sent them out to be converted to a usable format for DocuWare. Those records were just received this week. Our volunteers continue to work their way down to the first ordinance, which should take about another four weeks.

Once the ordinances have been completed, the volunteers will move on to resolutions. Then the next phase will be to scan City Council packets (which I believe we have going back to the 50's).

At the completion of that process, the scanning project will be reassessed.

Item #: 6D
Meeting Date: 10-5-10
Page #: 1

Use and Training

Currently, the City Clerk and the Administrative Intern are the only persons using the DocuWare as a research tool. The Administrative Services Director/City Treasurer was recently shown how it works and was able to perform research on his own. Within the next 60 days, all managers will receive instructions on its use.

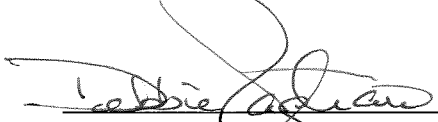
Shortly after that, our IT Department will begin working with Scott's Technology (providers of the DocuWare software system) to provide a search link on our website so that anyone using the City website will be able to access these same search tools.

It is our hope that once the other departments begin using DocuWare as a research tool, that they will begin scanning their respective historical documents.

STAFF RECOMMENDATIONS

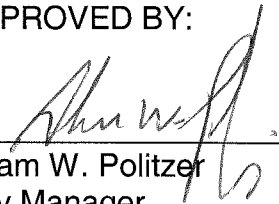
No action needed – this item is informational only

PREPARED BY:



Debbie Pagliaro
Assistant to the City Manager/City Clerk

APPROVED BY:



Adam W. Politzer
City Manager