

## MEMORANDUM

**TO: Mayor & Staff**

**FROM: Kimberly McWilliams, Clerk of Council**

**SUBJECT: Document Management Software Solution**

**DATE: August 5, 2014**

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I wanted to give you an update on the software project and address any questions or concerns.

A document management software solution will give us the capability to streamline processes for securely storing, indexing and retrieving all files and create greater efficiencies within every department.

Per our purchasing code, it was appropriate to get two more proposals. Sharon and I met with Fire Proof in Grove City and Prime Tech out of Dublin. I do not have the formal proposals, however, from our meetings in comparison to Intellinetics, their costs will be considerably higher.

Training would consist of one day in a department with the appointed record designee. Four hours will be allowed for end user and scan station training, and a separate two hour session will be devoted to system admin (IT). During those four hours, they will be on-site to provide hands on training to make sure the users are completely comfortable how to scan, index, retrieve, and publish (email, print, copy). They have assured me there will be minimal disruption to department schedules. They also provide electronic and printed documentation of end user, scan station and system admin for reference at any time.

There will not be any additional IT monetary costs next year for the project. I have been assured by our IT Department that the City's server will easily handle at least 25-30 users and all 10 areas without issue. There will be no need to consider a server upgrade. As long as we have a storage capacity of 184 GB, which we currently far exceed, we will be able to house every piece of historical and currently boxed documents that represent the entire City without any issue.

There is a yearly maintenance cost that I will pay for out of my budget in the amount of \$3,597, which includes tech support, upgrades, etc. to maintain the software for all departments. There is a cost savings on Microfilming in the amount of approximately \$2,000 a year and over \$7,000 savings (two yr savings costs) which is the expense for the Microfilm Reader. Each service area will be an additional \$5,999, which I will also budget for out of Council Dept.

#### PROJECT TIME-LINE 2014

- Back to Committee of the Whole with all three proposals & RCA
- The two services areas to launch software will be Council & the Legal Department
- Recommendation for First Reading Consent Agenda
- Will not need a supplemental, will use the \$100K budgeted out of consulting services
- Determine three more departments for next two year period

#### 2015 – 2016

- Launch software in additional departments

I appreciate your time and effort to help make this project a success.