



AGENDA REPORT

Department: City Clerk's Office
Prepared by: Shelley Chapel, City Clerk
Meeting Date: Tuesday, August 1, 2023
Approved by: Scott Huth, Acting City Manager

SUBJECT:

Approve an Agreement with Complete Paperless Solution (CPS) for an Enterprise Content Management Software - Laserfiche

RECOMMENDATION:

Adopt the Resolution entitled, "Resolution of the City Council of the City of National City, California, Approving an Agreement with Complete Paperless Solutions to Purchase an Enterprise Content Management System, and Authorizing the City Manager to Execute the Agreement."

BOARD/COMMISSION/COMMITTEE PRIOR ACTION:

Not Applicable.

EXPLANATION:

Background

The City Clerk is the custodian of records for the City, and oversees the City's Records Management Program. In compliance with laws and regulations, the City Clerk develops the file plan and storage and retrieval system for storing paper and electronic records.

The City of National City purchased a records management software by the name of Questys in 2000. Records stored in this electronic environment include all of the City's Minutes, Resolutions, and Ordinances as permanent documents. Other documents such as Recorded Documents, Contracts, and other historical records are being scanned when staff time allows. In addition to the City Clerk's Office, other departments utilize Questys to store some records.

The Questys product quality has declined over the years with only minor upgrades and has fallen behind compared to other technology and Enterprise Content Management (ECM) Systems available. Laserfiche is a proven leader in the area of Electronic Document Management Systems (EDMS).

ECM is an Enterprise Content Management System which enables organizations to securely manage content and information throughout the lifecycle of a record.

EDMS is an Electronic Document Management System that manages the creation, use and storage of documents and records.

Laserfiche is a pioneer in the ECMS Technology as it was originally developed in 1987, and continues to transform organizations in more than 80 countries.

Laserfiche can achieve both functions of Enterprise Content Management Software (ECM) through automation. It has the ability to recognize certain forms and documents to automatically populate data fields, eliminating the need for staff to enter information manually. This importation of metadata also automates the document search and retrieval process by capturing and classifying identifiable keywords, annotations, file names and records retention parameters. The system utilizes tools like Office 365 to allow collaboration among employees to share content while working on projects together.

The system will also provide audit logs for administrators of the system to ensure records are properly managed throughout their lifecycle.

Laserfiche integrates with many of the business processes used in the City and will assist staff in automating and sharing more records. In turn this will provide access to more records online through a public portal on the City website. Providing more City records online allows the public to conduct their own research on their time and reduces Public Records Requests by being more accessible and transparent.

In time, this system could replace currently used software in departments to enhance the organization of records by accessing them all in one location. One example of this is the integration of eSCRIBE, the software currently used to automate the City Council agenda process. Once the City Council Meeting has taken place, the agenda packet will be saved into Laserfiche as an historical record with all contents searchable.

Analysis and Conclusion

Historically, the City of National City has launched limited technology regarding the storage of records, creating record repositories where public records can be stored, organized, and searched. The work processes in the City in the past were paper (hard copy) which decreases internal staff efficiency and effectiveness, and negatively impacts the ability to make information available to the public. Hard Copies must be stored either on-site in very limited space, or offsite in a storage facility at a cost and includes additional charges if staff has requests for storage and retrieval. An example of retrieval would be in response to a Public Records Request.

Complete Paperless Solutions (CPS) will be providing the City with a turnkey solution, including all software and related services for design, data migration, development, deployment, training, and support of the system.

Utilizing an ECM/EDMS system that is as robust as Laserfiche will actually reduce costs and use of resources. The savings on the annual Quesyts contract would be \$16,112.02, and there would be additional savings as a result of a reduction in the amount of record storage boxes, copy paper, and toner purchased, and a lesser need for off-site storage.

The City Clerk has twenty years (20) experience with Laserfiche products, including developing the database and file architecture for the City of Poway's Laserfiche system and public portal. This experience will provide insight into best practices on developing the system to best fit the needs of City staff and the public portal for easy access and searchability.

The City Clerk's Office is seeking to subscribe and implement a comprehensive cloud based electronic content and records management software, including all software and related services, as well as the conversion of the Questys database.

The current contract with Questys expired on June 30, 2023, however, the agreement is paid on an annual basis and can be terminated with thirty (30) days of notice.

Staff recommends approval of the purchase of Laserfiche ECM/EDMS as a replacement for Questys including a professional services agreement with CPS for an initial period of three (3) years and authorizing the City Manager to extend the terms of the agreement in one-year increments for an additional three (3) years.

FINANCIAL STATEMENT:

All pricing is based off NCPA Contract #11-25 which is a competitively bid government contract. NCPA (National Cooperative Purchasing Alliance) is a leading national government purchasing cooperative working to reduce the cost of goods and services by leveraging the purchasing power of public agencies in all 50 states. The proposed system upgrade will have a one-time cost of \$82,000. The annual license and support services cost will be \$5,875, and the annual support services for three (3) years will not exceed \$20,000. Funding for this project is in Account Number 629-403-082-299-0000.

RELATED CITY COUNCIL 2020-2025 STRATEGIC PLAN GOAL:

Communication and Outreach

ENVIRONMENTAL REVIEW:

This is not a project under CEQA and is therefore not subject to environmental review.CCR15378; PRC 21065.

PUBLIC NOTIFICATION:

Agenda Report posted within 72 hours of meeting date and time in accordance with Brown Act.

ORDINANCE:

Not Applicable

EXHIBITS:

Exhibit A – Agreement including Attachment A – Scope of Services

Exhibit B – Laserfiche Proposal

Exhibit C - Resolution