

Kathleen McGraw

From: Kathleen McGraw
Sent: Friday, April 05, 2019 2:31 PM
To: Georgine Scott-Codiga - CGJ; jlevin.cgj@scscourt.org; hoberhelman.cgj@scscourt.org
Subject: Additional Info re: 4/5 CGJ Meeting w/Santa Clara City Manager
Attachments: EDMS Update 4-5-19.pdf

Good afternoon,

Deanna asked that I forward the attached as well, this is one of the referenced PowerPoints she mentioned during her conversation with you regarding Monday's strategic meeting for advancing LaserFiche and Next Record.

Regards,

Kathi McGraw | Executive Assistant to the City Manager
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**City of
Santa Clara**
Empowering the Future

City of Santa Clara Enterprise Document Management System Update

April 8, 2019



**City of
Santa Clara**
The Center of What's Possible

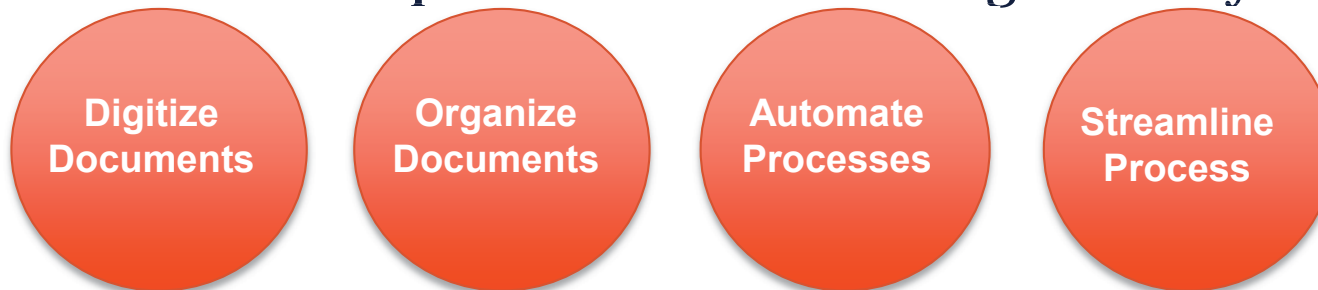
Agenda

- Laserfiche
- Project Goals
- Initial Projects & Status
- Timeline
- FitGap Analysis
- What's Next



What is Laserfiche?

- Laserfiche is an Enterprise Document Management System (EDMS):



- 35,000 customers with 5 million users worldwide
 - More local government customers than any other EDMS system
 - 400 customers in 15 states
 - 13 counties and more than 125 cities in California
- ECS is the #1 provider of Laserfiche solutions in Western US and has offices in the Bay Area

Project Goals

- Implement a citywide system to store and find documents
- Reduce paper, digitally manage information
- Implement electronic forms, streamline processes and workflow
- Enable increased transparency and accountability via public web portal and enhanced search capabilities
- Implement digital and electronic signatures for contracts
- Retire Sire system (end of life 07/19)



Initial Departments/Projects

- **City Attorney:** Legal Service Request form
Workflow and electronic signatures (DocuSign) for contracts
- **Silicon Valley Power:** Electronic forms and department wide document management
- **City Clerk:** Centralize records retention management for city records from creation to disposition
- **Fire Dept:** Access to maps, surveys, Hazmat and other documents in the field via smart phone or tablet
- **Other projects:** Permitting System Integration, GIS Integration
- Retire Sire



Current Status

CAO - LSR

SVP - FRAP

CCO - Records
Retention

CCO - Boards &
Commissions



City of Santa Clara
CAO - LSR

City Attorney's Office - Legal Service Request

Date Submitted: Data captured on form submission

Contact Person*

Contact Email*

From/Department*

Contact Phone*

Requested Response Due Date* 1/29/2018

Legal Service Requested* Select a legal service

Department Manager Username* city

Attachments

File Upload

Submit



City of Santa Clara
FRAP Application Form

SECTION 1: CUSTOMER INFORMATION

Reidentification

Account Number*

Name of Account Holder* Phone

Home Address (do not use PO Box)* City* Zip*

Mailing Address (different from home) City Zip

Email (optional)

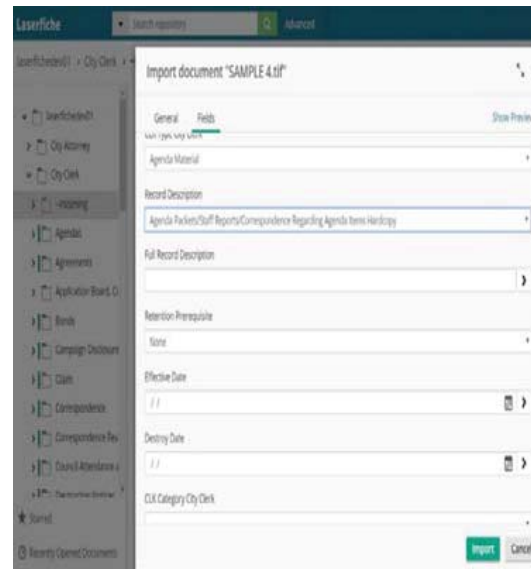
Number in Household

SECTION 2a: PUBLIC ASSISTANCE PROGRAM ELIGIBILITY

Eligibility Program #1 Eligibility Program #2 Eligibility Program #3

SECTION 2b: HOUSEHOLD INCOME ELIGIBILITY

Income Source #1



Laserfiche

Import document "SAMPLE4.tif"

General Fields

Record Description

Full Record Description

Retention-Prerequisite

Effective Date

Destroy Date

CLK Category City Clerk

Import Cancel



City of Santa Clara
Application for Board, Commissions, and Committee

Board/Commission/Committee Applying for*

Name*

Address*

Street Address

Address Line 2

City State / Province / Region

Postal / Zip Code Country

Email*

Primary Phone #*

Secondary Phone #

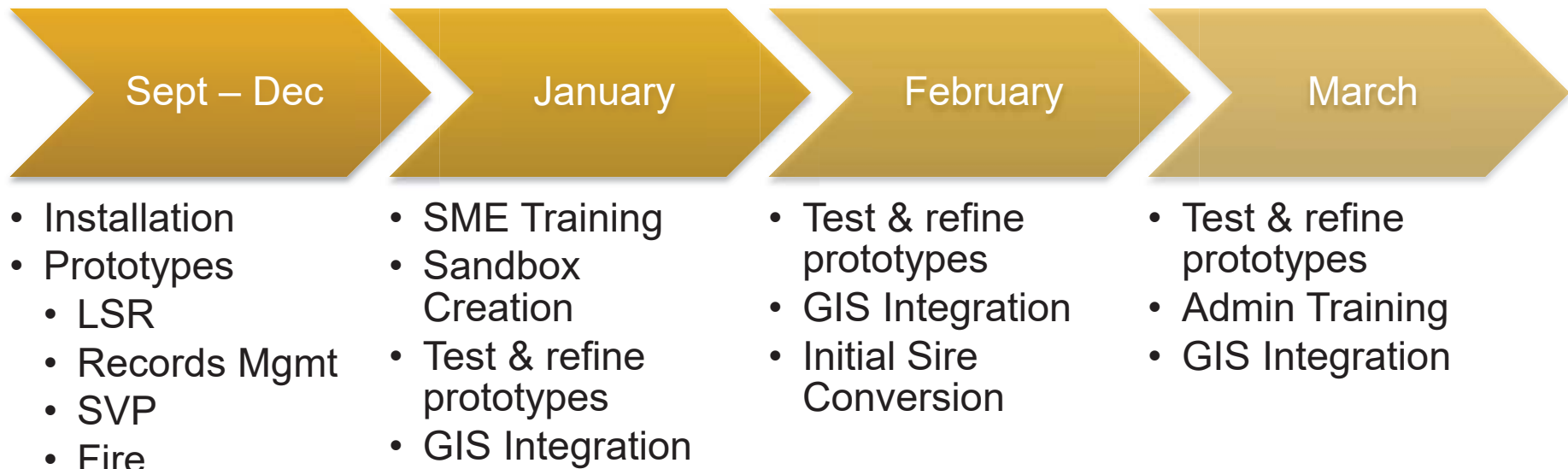
Are you eligible to vote in Santa Clara?*

Are you a registered voter of Santa Clara?*

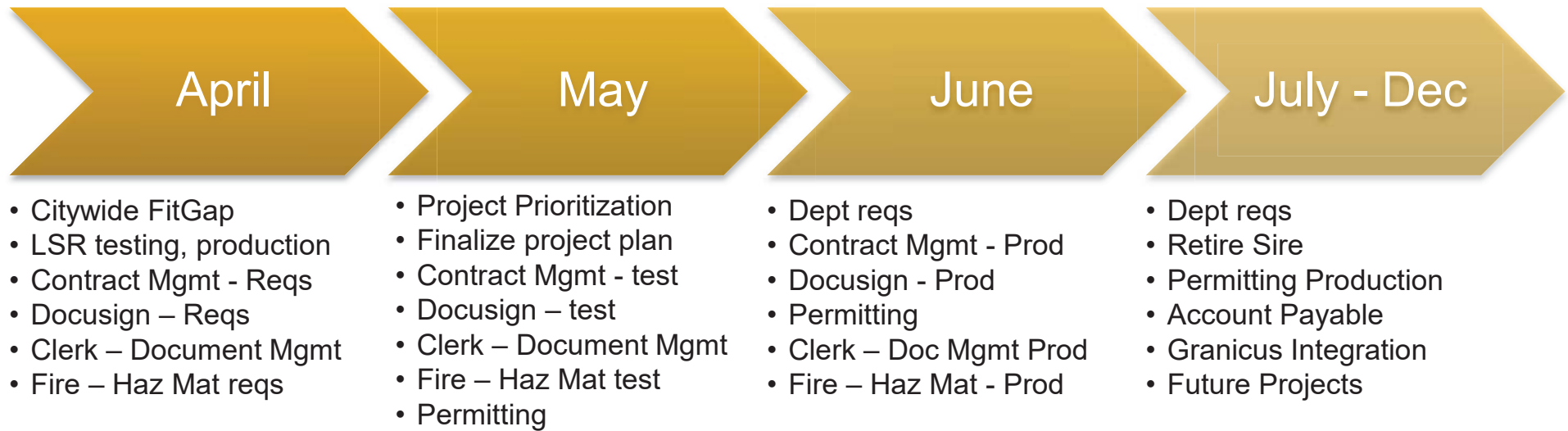
Have you attended a meeting of this Board/Commission/Committee?*

Present Employer

Timeline



Timeline



FitGap Analysis Meetings

- Designed to help each department:
 - Determine current process
 - Propose new & more efficient business processes to improve existing process
 - Determine what records may be made available through public portal
 - Digitize records and reduce paper
- Meetings: in coordination with staff project team and ECS Imaging
- Meeting Dates: April 11, April 15, April 16 & April 22
(Time slot assigned upon receipt of questionnaire)



What's Next

- Test, refine & implement prototypes
- End user training
- Complete Fit Gap analysis with each department City-wide
 - Determine existing use of SIRE and suggested improvements to be made
 - Determine other document management needs
 - Prioritize departmental needs
 - Determine additional resource requirements





Public Records 60 Day Review



First 60 Days

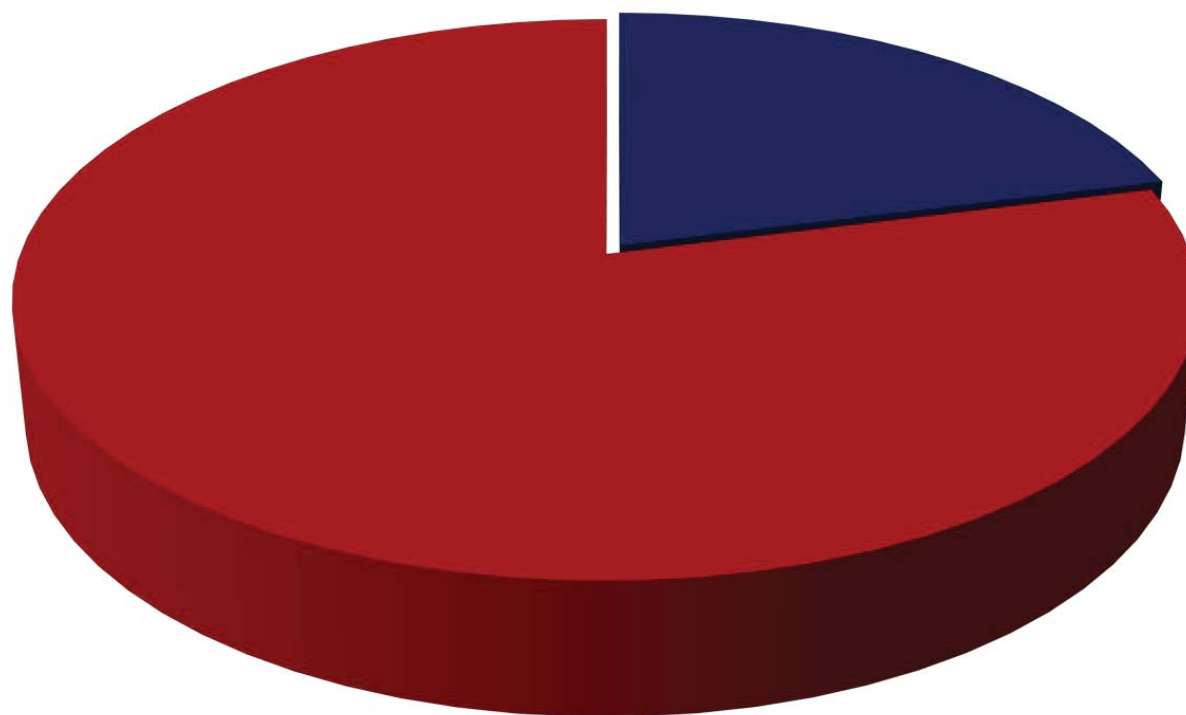
- Conducted department meet & greet
- Determined goals for the role of Public Records Manager
- Developed plan for sustaining knowledge, increasing transparency & implementing systems
- Developed plan for strategic planning/positioning



Total Citywide Public Records Request in 2019

114 Requests
Tracked

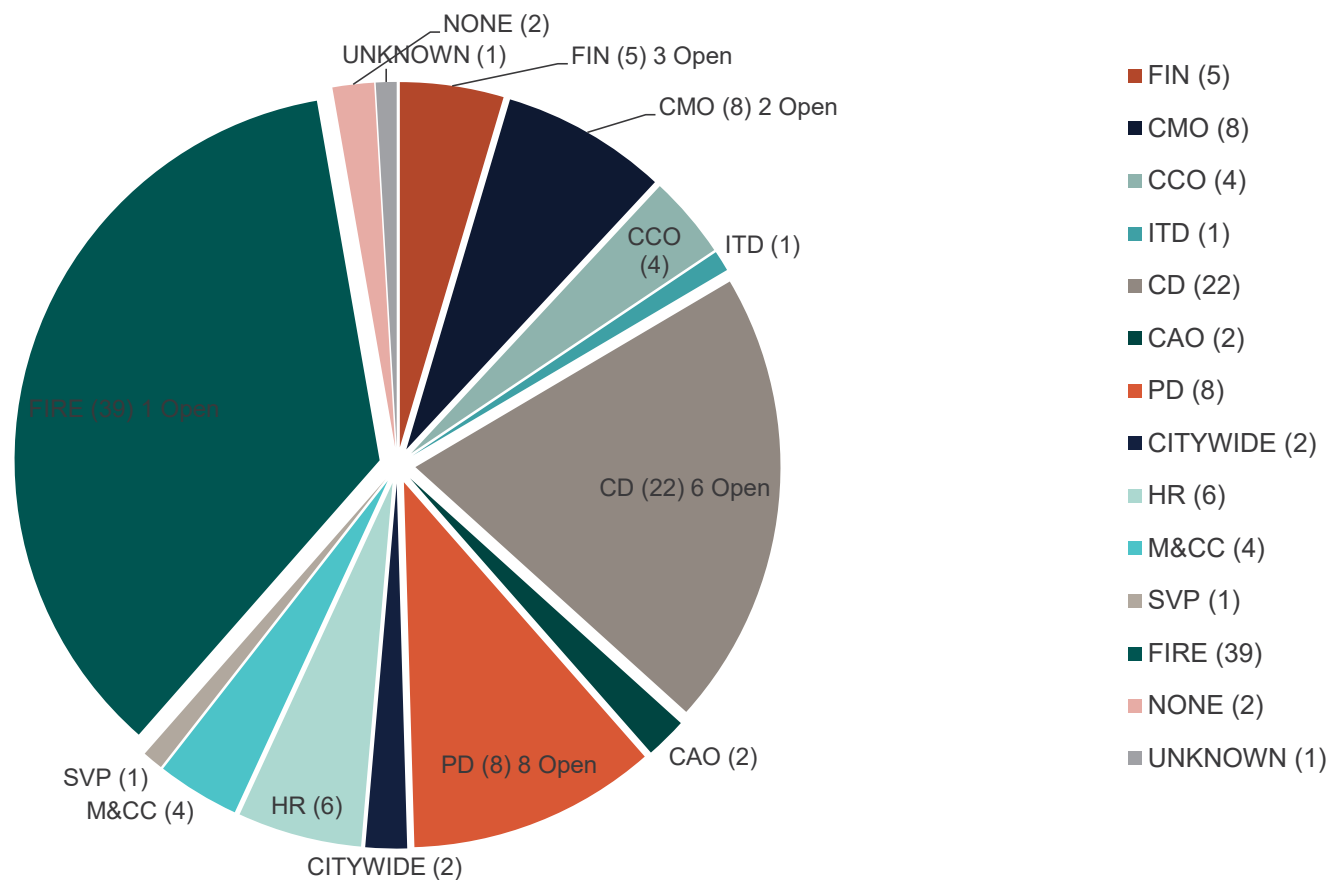
11
PRA Email
Sweeps



■ 24 Open ■ 90 Closed



Public Records Requests by Department





Managing Records

- Digitizing records
- Identifying records locations
- Email Retention Policy – CMD 42
- Utilizing software to increase efficiency
 - Laserfiche & Next Request

Why not just keep everything??

- Must look through it.
- Must track it.
- Takes up expensive space.
- Causes additional processing in litigation, audit, or public records requests.





Email Retention Policy

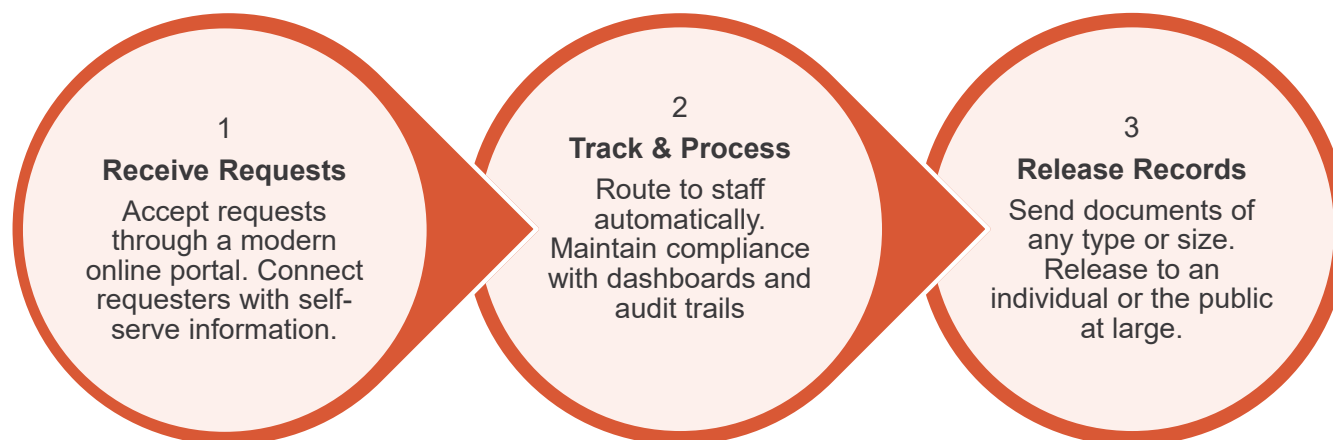


Folders outside the Inbox,
Calendar, Contacts, Tasks, Notes, Drafts
Items in these locations will remain
unless you delete them.



Next Request

Online portal to receive and respond to public records requests.





Public Records Legislation

- 112 Bills introduced in the 2019-2020 session year
 - *It is common to see various proposals for changes to the CPRA that often do not result in becoming law.*
 - Example: SB 615 (Hueso) Public records: disclosure.



Updates to Process

- Select departments have been routing PRA requests through Public Records Manager (testing centralized process)
- Refinement of email sweeps (coordination with IT)
- Citywide tracking of PRA's
- Created repository of PRA request, responses & responsive records
- Determined/identified Public Records Coordinators in each department



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Next Steps



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QUESTIONS?

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Public Records Manager

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