



City of La Habra Heights  
AGENDA REPORT

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To: Mayor and City Councilmembers For Meeting of: October 11, 2007  
From: Justin Powers, *JRP* Agenda Item:  
Community Development Dir.  
Through: Ronald Bates, City Manager *[Signature]*  
Subject: DOCUMENT SCANNING & DIGITAL ARCHIVING – QUESTYS SOLUTIONS

**BACKGROUND:**

In late 2006, the City upgraded its network infrastructure with multiple servers, increased storage capacity, offsite backup, and improved network capacity (gigabit). Those improvements along with IT support from Firstlight LLC, have led to a consistent, fast, and reliable network. However, the FY 06/07 funds dedicated to digital document archiving were reallocated to network improvements. The funding for digital document archiving are in the approved FY07/08 Budget.

**ANALYSIS:**

*Document Scanning*

Staff over the past year received estimates for document scanning from vendors that have the capability to scan color, large format plans, and odd size documents such as building permits. Staff had various vendors visit City Hall to estimate the amount of documents on the site to digitally archive and the estimates range from 200,000 to 250,000 documents. The estimates were around \$15,000 dollars for prep, scanning, quality control, indexing, and placing on CD-ROM. Each document software vendor has its own scanning service, so the software vendor does the scanning, Questys Solutions will perform the scanning (Exhibit 1). The scanning proposal of 200,000 documents can be done over multiple years, but acceptance of the attached quote will lock in the rate, which staff can budget over future fiscal years. The current FY 07-08 has budgeted \$5,700 for scanning from the budgets of Community Development and the City Clerk.

*Document Management Software - Questys Enterprise Solution*

The goal of the document management system is to improve worker productivity, to reduce paper work and the amount of time looking for misplaced documents, and to respond quicker to records and residents requests. Questys database is open and not proprietary, so it is possible to integrate the documents with GIS and other software solutions. Questys software is used by other agencies (Exhibit 3) and staff is impressed with its capabilities and expandability.

A few anecdotes may help Council understand the current filing situation. Last month, there was a public records request for the Conditional Use Permit (CUP) for a fire station located at 2426 Vista Road. It was not located in the box containing old CUPs, staff spent approximately 12 hours looking for the case file. Staff finally found the file, filed under Hacienda Road, probably due to the fact, it was for a fire station and the person thought there was only one fire station located in the City. Another common occurrence is change of address. Since cases are filed under the address or case number, when there is a change of address, every file reference needs to be changed and unfortunately, the records can go back before the City's incorporation. With the Questys Solution, the documents will be scanned and index based on each Department's requirements. In Community Development, each document will be indexed by Assessor Parcel Number, address, and document type, such as Building Permit or Conditional Use Permit. Each document will be OCR'd (Optical Character Recognition) so that the text of each document can be searched. In the case of the missing fire station file, staff could have done a full text search for Conditional Use Permit and fire station, and found every reference in a document containing those two phrases.

Some unique features of the Questys Solution are document policies, permissions and destruction of files. With Questys Solution software, one can block out private information such as confidential information on Sheriff's Incident Reports. So if one logs in as the public, the private portions of the document can be blacked out. These permissions can also work internally with staff; certain employees can view the confidential data such as Social Security numbers and others cannot, however the permissions are set. Questys solutions can be used for records retention, when documents are entered into the system, the system can keep track of when documents need to be destroyed. When the City Clerk decides to go to City Council for document destruction, the system will produce a report for records ready to be destroyed. This process makes the document destruction process easier to track, produces reports for the City Council and tracks documents for destruction.

Questys Solutions has other products that City Council has asked about in the past such as agenda report creation, posting entire agenda packets online, and integration with streamlining video online. All of Questys Solutions' products are tailored to municipalities. City staff received details proposals from Questys and Matrix Imaging System. Matrix Imaging System also serves cities and was approximately \$10,000 for similar product as Questys and only allowed for 2 concurrent users, as compared to Questys's 9 concurrent users. Also Matrix did not offer future expandability for agenda creation and online video streaming. Staff looked at other solutions, however they did not meet the staff's requirements, non-proprietary database, optical character recognition (OCR), and ability to view various document formats.

#### **FISCAL IMPACT:**

As part of the FY2007-08 Budget, City Council allocated approximately \$13,500 in the City's budget for a digital archive implementation. There are sufficient funds allocated in the General Fund to cover the first year of implementation of scanning (\$5,700) and computer software, installation, support, and training (\$7,716.50), which is total of \$13,216.50.

#### **RECOMMENDATION:**

Authorize the City Manager to sign an agreement with Questys Solutions an amount not to exceed \$13,500 for the 2007/08 Fiscal Year (which includes first year of scanning, and software).

Exhibit 1 - Questys Solution Scanning Services Quote

Exhibit 2 - Questys Enterprise Solution, Support, Installation, and Training Quote

Exhibit 3 - Questys Solutions References



# EXHIBIT 1



September 4, 2007

Justin,

Scanning Service Corporation is proud to provide this quote for the City of La Habra Heights to scan the files. This quote is based on the knowledge that you will be operating the Questys Imaging System in the city. We acknowledge that there is quite a bit of scanning that is needed. So we are willing to provide the lowest price possible yet work on your budget and annual restraints.

I am providing the estimate on a per page cost for scanning and prep and a per file cost for indexing. The estimate will be for the permits in the 25 drawers of the filing cabinets, but the prices are good for any scanning the city may include (City Clerk, storage area, etc...). This gives us the quantity to allow for a lower cost.

In the 25 drawers, I am estimating 200,000 pages and 20,000 files. The cost are:

Scanning	\$0.045 per page	
Prep	\$0.03 per page	
Indexing	\$0.065 per file (manually)	\$0.03 per file (automated)

The estimated cost for the 25 drawers is \$15,600.00. This is for prep, scanning, automated indexing, QC and delivery of files on CDs. An average of \$624 per drawer.

For additional scanning, you can estimate \$175 per box for the small boxes and \$310 for the larger boxes. Also for the city clerk's shelves, you may estimate \$624 per shelf too.

Please remember that any new job started by the end of October 2007 also gets a 20% discount on the project.

If you have any questions, please feel free to call.

This quote is valid for 90 days.

Thank you,

Michael Friedman