



City of Santa Ana
20 Civic Center Plaza, Santa Ana, CA 92701
Staff Report
July 18, 2023

TOPIC: Electronic Document Management System Upgrade

AGENDA TITLE

Approve an Agreement with Cities Digital, Inc. to Provide Electronic Document Management System, Laserfiche Upgrade and Migration with Geographical Information System Integration in an Amount Not to Exceed \$87,340 for up to a Five-Year Term (Non-General Fund)

RECOMMENDED ACTION

Authorize the City Manager to execute a consultant agreement with Cities Digital, Inc. to provide an Electronic Document Management System, Laserfiche Upgrade and Migration with Geographical Information System Integration in the amount of \$76,600 for services and licensing, and \$10,740 in contingency funds, for a total amount not to exceed \$87,340 for a three-year term beginning July 18, 2023, and expiring July 17, 2026, with an option for two one-year extensions, subject to non-substantive changes approved by the City Manager and the City Attorney.

DISCUSSION

In 2005, the Santa Ana Public Works Agency (PWA) initiated a project to scan their existing engineering drawings and as-built plans into a virtual database. At the time, the City selected Laserfiche Document Management system in order to remain consistent with the program the City Clerk's Office was using to store the City's official records and documents, such as agendas, minutes, resolutions, and ordinances. Due to the software selection being already established, PWA proceeded with the project without conducting any requirements analysis of the software to assess its suitability for the PWA Electronic Document Management System (EDMS).

During the initial analysis it was determined that Laserfiche was insufficient for the storage of engineering drawings, due to the way the existing index of the documents was created. The existing Microsoft Access index of engineering drawings included standard information like drawing types, project types, numbers, and dates, but it also included a rudimentary spatial index based on the project extent recorded as the street name, from street to street. Each drawing was meticulously indexed to include all possible streets that the project included, even if that meant indexing the drawing multiple times.

At that time, the indexing schema for the Laserfiche database could not accommodate the multiple indexing method for the streets without storing the document multiple times in the system. The City's Consultant devised a method that would allow indexing of the drawings using the existing index, keeping only one drawing in Laserfiche, and the system was completed in 2007.

In addition to the engineering drawings, the City has various Right-of-Way (ROW) map books that were scanned and converted to images in the early 2000s. The pages in the ROW map books reference various areas of the city where non-traditional transfer of land ownership occurred. This could be a corner cut, a utility easement, right-of-way, or other type of deed recording.

In an effort to aid users with searching for deed information spatially, the Geographic Information System (GIS) section added this layer to the internal web map viewing application (GeoMedia Webmap). When the City switched to ESRI from Intergraph in 2012, the ROW layer was added to the GovClarity GIS viewer. The layer was intersected with the parcels in GovClarity to reduce the confusion of the overlapping ROW deed book polygons. When a user clicked on a parcel, they were presented with a list of available ROW pages to choose from and they could click the link to be directed to the Laserfiche scanned document on WebLink. This solution, while effective, has not been maintained and the City desires a new method of referencing deed information that can be integrated into a newly proposed solution.

In 2013, PWA began a project to update the web-based front end to a more responsive HTML5 format. That project was completed in 2015 and the Consultant contract ended. While the system is still functional today, there have been no updates or maintenance performed on the system since the release of the HTML5 version. In 2018, the PWA servers were virtualized and put into the City's main server room.

Currently, the PWA EDMS solution is hosted on a virtualized server running the Windows 2008 R2 operating system. This operating system has already reached the end of its support lifecycle with Microsoft and is no longer provided with security updates. The City's Information Technology Agency has mandated that all applications running on older, unsupported operating systems be moved or upgraded to new servers that are supported by Microsoft. Based on this requirement, the Public Works Agency has determined that it is necessary to upgrade and migrate its existing EDMS solution to a new open theme standard (OTS) software solution instead of using a custom-developed application. The updated solution should function on the latest versions of Microsoft Windows and structure query language (SQL) Server that are supported by the City and match the existing versions of Laserfiche that the City is currently using with the flexibility to upgrade to newer versions without the need for major changes to the new solution environment.

On February 16, 2023, the Public Works Agency released Request for Proposal (RFP) No. 23-009 seeking the services of qualified firms to provide EDMS/Laserfische Upgrade & Migration with GIS Integration. The RFP was advertised on the City's online procurement management and publication system, with proposals due on March 22, 2023. Four proposals were received and evaluated by a selection committee made up of members from the IT and Public Work Agencies. Based on criteria outlined in the RFP, the top two ranking firms were invited to an interview allowing the potential firms to highlight their proposal submittal and answer any questions from the evaluation committee. Below is a list ranking the firms based on the final evaluation of the proposals and interviews.

Firm	Location	Rank
Cities Digital, Inc.	Hudson, WI	1
DocuNav Solutions	Frisco, TX	2
Global Solutions Group, Inc.	Oak Park, MI	3
RedEye Apps, Inc.	Golden, CO	4

The proposal submitted by Cities Digital, Inc. offered the best solution and staff recommends entering into an agreement with this vendor (Exhibit 1). Cities Digital, Inc. is highly qualified, has 20+ years of proven experience with large and small government agencies, and has an account executive/manager based out of Orange County.

FISCAL IMPACT

Funds for the existing budget associated with the project were appropriated in FY 2022-23. However, the award of the contract has crossed into a new fiscal year, a request to carryover funds in the accounts below will be submitted as part of the Citywide carryover process.

The Citywide carryover request is typically presented to the City Council in September or October after year-end balances of the prior year are available. In order to avoid delaying the project until September/October, staff are moving forward with the project and will expend funds in the accounts identified below with the understanding that approval of the carryover request will occur at a future date.

The current fiscal year funding is available in the FY 23/24 budget. Any remaining balances not expended at the end of the fiscal year will be presented to City Council for approval of carryovers to FY 24/25.

Fiscal Year	Accounting Unit - Account No. (Project No.)	Fund Description	Accounting Unit - Account No. Description	Total
2023-24	10117601-62300	Public Works- Admin & Planning	Public Works- Admin Services, Contract Services-Professional	\$83,340

Fiscal Year	Accounting Unit - Account No. (Project No.)	Fund Description	Accounting Unit - Account No. Description	Total
2024-25	10117601-62300	Public Works- Admin & Planning	Public Works- Admin Services, Contract Services-Professional	\$1,000
2025-26	10117601-62300	Public Works- Admin & Planning	Public Works- Admin Services, Contract Services-Professional	\$1,000
OPTIONAL ONE-YEAR EXTENSION				
2026-27	10117601-62300	Public Works- Admin & Planning	Public Works- Admin Services, Contract Services-Professional	\$1,000
OPTIONAL ONE-YEAR EXTENSION				
2027-28	10117601-62300	Public Works- Admin & Planning	Public Works- Admin Services, Contract Services-Professional	\$1,000
TOTAL				\$87,340

EXHIBIT(S)

1. Consultant Agreement with Cities Digital, Inc.

Submitted By: Nabil Saba, P.E., Executive Director – Public Works Agency

Approved By: Kristine Ridge, City Manager