

Title:	Agenda packet storage and search solution	Project:	OnBase - Agenda packet solution
Date:	09/25/2018 (revised 3/4/2019)		
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Proposed Change Description:

The LFUCG Office of the Urban County Council is looking for a way to archive committee/agenda packets in an organized manner and then have the capability to do a text search on those documents. For example, a staff member wants to find every agenda committee packet that had the word "clays mill". The solution would allow the ability to search and find any document that contained the value "clays mill".

Current Situation (Council Office):

Committee Agenda packets are created for each meeting. The packets include the Agenda Page, summary of motions (minutes), presentations, referral lists, ordinances/resolutions/other legislature, and other materials all combined into one PDF rather than having multiple file types. The WS packets may have a different layout but the end result is the packet is combined into one PDF. The packets are placed on the I:Drive in a directory structure that contains folders that represent the Committee Name; and within each of those folders the Year; and then within that folder the files are named <committee initial-date.pdf>, for example, ws 2018-08-21.pdf.

Council has a need to research and find subject matter from the agenda packets and it is very cumbersome and time consuming to research these requests for information related to certain subjects or topics. This requires staff to spend hours looking in folders and drilling down by committee, year, and date to attempt to find information and

be responsive to requests. The combined agenda packet documents are not full-text searchable and therefore must be read word for word in order to find the information.

The Urban County Council is looking for a solution that will provide the ability to search the agenda packets for key words. It would also be nice to narrow down the searches by date and/or committee, in addition to a wildcard search. The solution would return any document(s) that contained a match for the search selection.

Current Situation (Council Clerk):

The Council Clerk currently has documents stored in OnBase that are not full-text searchable. They are looking for a solution that will provide the ability to conduct text searches in OnBase. This is the same requirement as Council.

Proposed Solution:

VeBridge evaluated the current OnBase Software licenses that LFUCG currently has purchased/available to determine if OnBase could provide a viable solution. VeBridge was able to configure a proof of concept solution utilizing the OnBase Batch Optical Character Recognition (OCR), Workflow, and OnBase Core system licenses.

The basic solution assumptions are as follows:

- 1) LFUCG will place the Agenda packet PDF's in their designated committee folder with the required naming convention.
- 2) OnBase will consume/ingest those documents via an automated process configured by VeBridge.
- 3) OnBase will perform auto indexing of the documents based on the directory folder name (committee) and the file name (date). The committee and date key words will be applied to each document.
- 4) The documents will go to a workflow OCR Queue where they will be automatically OCR'd creating a full text rendition of the

- document along with the original PDF. This process will not require human intervention.
- 5) The document is now available for retrieval by the keywords associated with the documents or a combination of keywords and full text search values:
 - a. Committee Name
 - b. Date
 - c. Full text search of any value
 - i. Wildcard search capability
 - d. Custom Queries can be created based on user need within the scope of hours in this proposal
 - e. VeBridge will configure the document retrieval repository for Council to store the documents in OnBase.
 - 6) Training –
 - a. End user Training
 - b. Solution configuration overview will be provided to LFUCG System Admin
 - 7) Council Clerk Addition:
 - a. Document the Specific Process to OCR existing documents in OnBase and Train designated Clerk staff/IS on the process to perform the action. Council Clerk will be able to utilize the same solution as above, only requiring an additional 4 hours of effort. This has been added to the cost section of this proposal.

Justification:

To streamline the process to store agenda packet information and make it available to staff members. In addition, provide a simple way to search for Agenda packet information vs. the current manual process.

Affected Requirements:

The documents will be stored in the LFUCG OnBase system as a new document type group. LFUCG OnBase systems administrator will be responsible for creating the OnBase document type group

configuration as well as security access groups required for the documents.

Impact on Cost:

The estimated cost for the above solution is 29 hours at \$175 per hour for a total of \$5,075.00.

NOTE: The above estimate is based on the proof of concept solution that was configured and demonstrated to Council. This is a time and materials contract. If additional effort over and above the time allotted is required, it will be billed on a time and materials basis.

Impact on Schedule

N/A

Impact on Resources:

N/A

Detailed Review Results:

Approved Defer Until: _____ Declined

Reasons/Comments:

N/A

Payment Terms:

All items previously contracted will follow the contracted payment terms.

Final Approvals:

LFUCG Urban County Council		VeBridge a Konica Minolta Company	
Name:		Name:	
Position:		Position:	
Signature		Signature:	
Date:		Date:	