



OnBase Implementation Plan

For the City of Hudson

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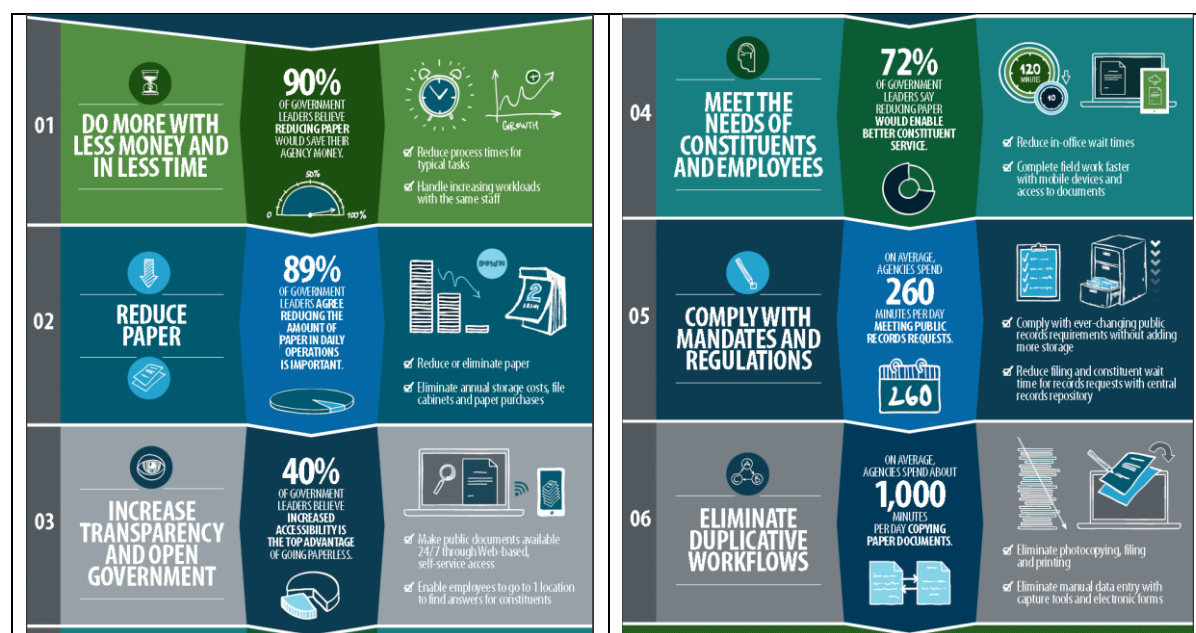
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Executive Summary

OnBase is a content management software suite created by Hyland Software out of Westlake, Ohio. As part of the City's continuous improvement initiative, OnBase will ultimately allow the City to eliminate paper and drive efficiencies throughout the organization. We have started the scanning process of existing paper documents, but this process has historically been fragmented and has usually been administered by individual departments, resulting in the creation of different silos of scanned documents. OnBase will allow us to consolidate these scans and store them in a central location. In addition to the content management functionality, the OnBase suite also provides extensive business process management (BPM) functionality allowing organizations to build and configure operational workflows. Whether it is building onboarding portals or automating the approval/payment process of invoices, OnBase can be the platform that we use.

Highlights

As the City continues to improve its status as a "High Performing Organization", it is imperative to identify weaknesses and find innovative solutions to resolve these challenges. Enterprise content management (ECM) is one of those solutions. This infographic highlights six common government challenges and how ECM can help make transformative changes to overcome them.



Objectives

Use the OnBase suite to improve efficiencies throughout the organization. During the implementation process of OnBase, each city department will learn to understand their current content/document management needs. This exercise will provide opportunities to streamline their processes during implementation.

OnBase Use within the City

The first phase of this project will concentrate on the digital conversion, organization and consolidation of documents. Each department will be challenged to review their existing “paper-related” processes and assess if they are currently managing their documents in the most efficient and effective manner possible. The matrix below shows the results of a survey conducted with various city departments to score their current assessment of their document management procedures. The areas shaded red are the current areas that need the most assistance within each department.

Current Problems and Inefficiencies within Departments

	Large volume of paper files	Records retention schedules not always being followed	Public records requests are labor intensive	Files are scanned but not easy to find	Documents and files are not well organized
CD					
Engineering					
HR					
Payroll					
Communications					
Administration					
Finance					
Police					
Fire					
EMS					
Council					
Public Works					

Implementation Project Details

The City will hire the services of Kiriworks (an OnBase implementation specialist) to assist in the installation, configuration and training of the OnBase suite. IT staff will manage this project with assistance from Kiriworks staff when needed. We anticipate each department will take approximately 4-6 weeks to be OnBase-ready and departments will be implemented simultaneously.

Departmental Implementation Tasks

- Meet with department leaders to explain the project and discuss expectations of staff
 - Assemble/select small team
- Perform document inventory
 - Where existing documents are located?
 - How are existing documents organized? (By address, alphabetically etc.)
 - What documents need to be saved and what documents are no longer needed?
- Create a document indexing/naming strategy
- Assign department teams with specific roles

- Install software for staff involved with the OnBase project
 - Provide training
- Set timelines for implementation steps and discuss expectations of team members
- Perform the document conversion process

Project Timeline for Enterprise Content Management (ECM) Conversion

	Year 1				Year 2				Year 3			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Initial Install & Setup												
CD & Engineering												
HR												
Payroll												
Finance												
Police												
Fire												
Council												
Public Works												

OnBase ROI – How will this software save the City of Hudson Money?

Software and equipment that can be Eliminated or Consolidated

- AssureVault – Council document management and storage software (\$2,850/year)
- Legistar (\$8,160/year)
- Scanned Drawings website
- Reduction in storage space – centralized storage location, less files to be managed (backed-up, monitored etc.)
- Opportunity to further reduce printer/lease costs throughout the organization
- Reduction in paper and printing purchases
- Removal of file cabinets provides more useable office area

Time Savings for Existing Processes

Here are some of examples of efficiencies OnBase will provide within the City of Hudson:

- Public records requests, quick access to documents and redaction
- Internal and external (outside of the city's network) access to all city related documents
- Job application and interview process
- Onboarding process
- Employee evaluation process
- Approval of invoices

Pricing

The following tables contain the pricing required to begin the OnBase implementation within the City of Hudson. This will give us the baseline software required to begin the transition from paper to digital document storage. The second table outlines the expected professional services hours required to assist the initiation of this project. All software costs are listed at the State Term Contract rate with Hyland.

OnBase Enterprise Content Management Software (1st Year)

License Name	Quantity	License Price
Local Government Bundle Includes Multi-User Server (1), Unity Client Server (1), EDM Services (1), Application Enabler (single application) (1), Full-Text Indexing Server for Autonomy IDOL (1) and Virtual Print Driver (1)	1	\$16,120.91
Local Government Web Server	1	\$4,030.23
Local Government Document Retention	1	\$4,030.23
Public Sector Constituency Web Access (pop. 22,437)	1	\$904.21
Directory Import Processor	1	\$4,030.23
Local Government Production Document Imaging (Scan/Sweep)	1	\$2,015.11
Local Government Concurrent Client (\$654.91 ea.)	7	\$4,584.37
Local Government Workflow Concurrent Client (\$1,007.56 ea.) Includes Workflow Studio & Unity Forms/E-Forms	1	\$1,007.56
Software Purchase Total		\$36,722.85
First Year Annual Software Maintenance		\$7,344.57

Professional Services (1st Year)

Services	Quantity	License Price
OnBase Implementation Services - Includes installation, configuration, knowledge transfer, solution training and project management - Assumes discounted prepaid block rate	60-hour block	\$11,115

	COSTS
TOTAL COSTS FOR YEAR ONE	\$55,182.42

Annual Recurring Costs	COSTS
The annual recurring costs will be comprised of: <ul style="list-style-type: none"> Annual maintenance costs (\$7,344.57) Additional licenses added – as we implement OnBase city-wide, the number of licenses will increase. At this point we do not expect the total number of licenses to exceed 15. 	\$7,344.57

Appendix

Staff Survey Results

Following a “high-level” OnBase presentation at the Police training center on February 21st, staff circulated a survey to attendees asking how they could see themselves using the OnBase suite. Here are the results:

Answer Choices	Item Selected (%)	Item Selected
Centralized storage system for all city scanned drawings	57.14%	8
Public records requests	92.86%	13
Public portal (online job applications)	64.29%	9
On-boarding	14.29%	2
HR Uses (evaluations, handbooks. Etc.)	50.00%	8
Payroll Uses (sick forms, etc.)	64.29%	9
Outlook Integration	57.14%	8
Digital plan review	35.71%	5
Invoices – convert to paperless	71.43%	10
Mapping integration	35.71%	5
Acknowledgements module (IT or Cell Phone Policy)	28.57%	4
Document approval processes	78.57%	11
Records retention	85.71%	12