



# Municipal Document Management

*The many ways that document management benefits municipalities.*



Shumaker Technology Group

# RECLAIM YOUR OFFICE!

with Document Management



DOCUMENT MANAGEMENT IS THE SIMPLE solution to making your office more efficient. Our document management system (DMS), *Content Central Enterprise Edition*, developed by Ademero Software, sets the standard for document management and workflow solutions in the municipal sector, and it's potential uses and benefits go even further.

## How Does It Work?

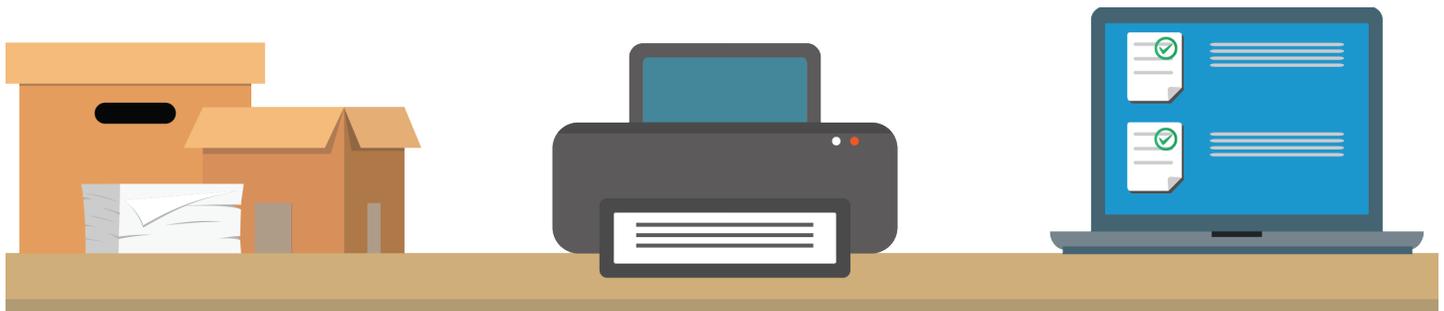
*Content Central* is a software application that is installed on a server on your network or hosted in the cloud. Hard copy documents like meeting minutes and agendas can then be scanned in, while documents that are already digital can be imported directly. Both scanned and digital documents combine into a single full-text searchable archive. In addition to those types of documents, municipalities also frequently use their DMS to manage contracts, human resource files, election info, financial records, and others specific to the given community's needs.

Users can login to *Content Central* through any web browser in order to scan, search, or interact with any of their documents. This also means that employees can have secure access to *Content Central* from remote locations, not just in the office, if desired.

## What Are the Key Benefits?

Investing in a DMS will take a bit of time and money. Rest assured, however, that your investment will pay off in numerous ways.

**SAVE TIME** One of the most obvious benefits is that it will save you time. Independent studies have shown that professionals spend up to 15% of their time reading information and almost 50% just looking for it. Once properly trained, it is quick and easy to run a document through a scanner and file it electronically so you can efficiently search for it later. This is as opposed to finding a file folder, printing off a label, walking over to the file room, and finding the right place to put



Scan

Upload

Search

the information. But, the real time savings occur when you are retrieving documents.

Let's imagine a scenario where you are a newly elected clerk and are working on applying for a grant from the State of Michigan. One of the questions asks you to list previous grants that you have received. Instead of digging through paper files or trying to remember on your own, you can quickly and easily retrieve a list of all these documents using the search function that *Content Central* provides.

**STORAGE SPACE** Many municipalities lack the physical space to store all the documents that they need to keep. This can lead to documents either being purged before they should be or stored somewhere they shouldn't, like a basement, which could flood, or even someone's home.

**BACKUP/DISASTER RECOVERY** Although we hope it will never happen, critical documents can be highly vulnerable to theft, fire or water damage, decay over time, and other natural disasters. While it is virtually impossible to backup a physical file cabinet, it is extremely easy and cost effective to backup your virtual databases and files across multiple geographic locations.

**RETENTION POLICIES** Many municipalities have one or more people who are responsible for going through old records every year and purging those that are no longer required under a retention policy. This can be a time-consuming process. With *Content Central*, this process can happen automatically. You simply input the retention schedule, and it will automatically purge documents at the correct time. It also makes it very easy to make a backup of the purged records in case something was accidentally misclassified and purged early.

One of the big ways *Content Central* helps to save money is by saving you time. However, there are other savings as well. After implementing a DMS, it is likely that you will make fewer copies and save on paper and toner. Additionally, it is also likely that you won't need to continue to purchase file cabinets, file folders, labels, etc. And, since

everything can be stored on a server, you won't be constantly running out of space and having to move files to a basement or off-site storage facility.

### What Are the Costs?

	<p><b>Software License</b></p> <p><i>Typically based on how many people will be using the system</i></p>
	<p><b>Hardware Needs</b></p> <p><i>You'll need an adequate server (many municipalities already have one) and perhaps one or more high speed scanners</i></p>
	<p><b>Data Migration</b></p> <p><i>Potential costs associated with migrating documents from an old document management system</i></p>
	<p><b>Maintenance &amp; Support</b></p> <p><i>This fee could be mandatory (you can't continue to use the software without paying for it) or optional, like with Content Central (you can continue to use what you have, you just don't get included upgrades and support)</i></p>
	<p><b>Installation / Customization</b></p> <p><i>Costs vary based on the complexity of your DMS needs and whether the process is done on-site or remotely</i></p>
	<p><b>Training</b></p> <p><i>Officials and employees should be adequately trained to be able to meet their projected uses of the system; may be done on-site or remotely</i></p>
	<p><b>Modules</b></p> <p><i>Unlike Content Central, many document management systems charge extra for certain features; be careful when comparing quotes</i></p>

### Workflow and Approval Processing

Most document management systems, including *Content Central*, are equipped to feature completely custom workflow and approval processes for documents. These features help walk a document through each stage in its life cycle. For example: your resident fills out an online permit, which is routed directly to your DMS. From there, the proper official can either approve or reject the permit, which would in turn direct that response to your resident who originally submitted the document.

## Ability To Export Documents

One very important thing to consider with a DMS is how easy it would be to get your documents back out if you should ever need to. *Content Central* allows documents to be exported, edited, reviewed, printed, deleted, saved, etc. depending on a user's permissions. You can even go back and review past versions of any given document to see how it has changed over time. *Content Central* is meant to be able to store documents in a functional way, accommodating whatever your current or future needs may be.

## State Retention Policy

Due to a lack of easily accessible resources and an abundance of varying opinions on the subject, many municipalities are not sure whether they are required to keep the paper copies of their records. We have heard people say that all hard copies of records must be kept, that keeping only digital copies is perfectly fine, and everything in between.

In fact, state law does NOT mandate any specific procedure for keeping public records. What they DO require is that municipalities protect the "authenticity, reliability, integrity, and usability of records." How this is done is entirely up to each agency. The only state laws that local governments must follow regarding document storage are the retention schedules.

So, if an office wanted to keep all records in a digital format, they are more than able to do so, as long as the municipality: "implement[s] appropriate policies, procedures, and business practices, in order to ensure that a digital record keeping system selected by the agency will protect the authenticity, reliability, integrity, and usability of the records contained in the system."

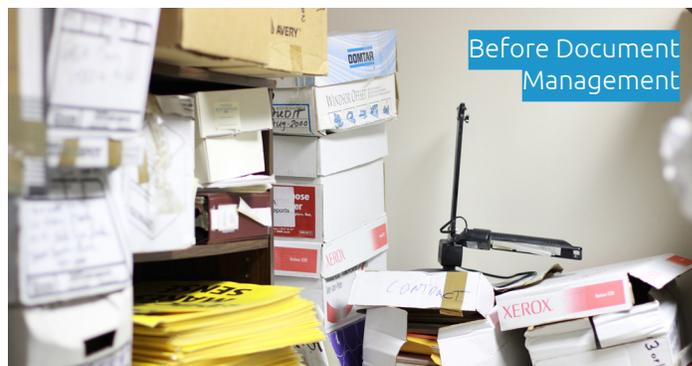
*Source: Michigan Department of History, Arts, and Libraries: Technical Standards for Capturing Digital Images From Paper or Microfilm*

## Archive Scanning

After purchasing a document management system, many municipalities are then faced with the question of how far back in time to go when scanning their archives. There is no single

right or wrong answer to this question; it truly depends on how important those records are and how frequently you need to access them. Some municipalities will choose not to scan the archive at all, but rather just start putting all the newly generated documents into the document management system. Others will seek out a document management system largely to help them scan in the archives. Keep in mind that there are mandated record retention schedules, so you will need to keep a digital or paper copy of those records for the time period specified in the retention schedule.

If you do decide to scan a significant amount of your past files, you are then faced with the decision of whether to do it internally or contract with a document imaging company. If you have a small volume (a few boxes to a couple of file cabinets) it is likely that someone on your staff can gradually complete scanning these over time. If you have multiple file cabinets, multiple rooms, or even multiple buildings worth of files, it may be most cost effective to contract with a firm that specializes in document imaging. They will have high speed scanners and people to devote to your scanning project to make sure it gets done on a timely basis. The Shumaker Technology Group offers a variety of these document imaging solutions to meet the needs of our clients.



## Scanner Recommendations

Many offices already have scanning functionality built into their office copier. However, if one or more people are going to be doing a lot of scanning, it may be more efficient in the long run to invest in a small desktop scanner for them so that they don't have to constantly get up from their desk and walk over to the copier every time

they need to scan something.

When picking out a scanner, there are many factors that you need to consider. Will your documents run through a sheet-fed scanner, or will you need a flatbed scanner that allows the documents to be placed face down on a piece of glass similar to a copy machine?

A good entry level desktop scanner would be the Epson WorkForce DS-530. If you're looking for higher capacity, the Canon DR-M160ii is an excellent choice. This scanner does 60 pages per minute (ppm) or 120 images per minute (ipm) if you are scanning double sided.



It's important that the scanners you select are compatible with all of your intended uses. First, make sure that they have industry standard TWAIN drivers. Most, but not all, scanners will offer this.

Also, make sure that the document management system you select has the ability to work with a variety of scanners from multiple vendors.

Do keep in mind that a regular desktop scanner won't be able to scan large documents such as blueprints. Specialized scanners do exist for this purpose, but they can be quite expensive. If you do have a large number of irregularly sized documents, you may want to consider contracting with a company that specializes in large format scanning.

### Access Control

One critical feature of a document management system is making sure that users are only allowed access to files that they should have access to. For example, everyone may want access to the meeting minutes, but only select individuals would have access to human resources files.

### Local or Cloud Hosted

An ever increasing number of document management companies (including the Shumaker Group) are offering a cloud-hosted option. This way, you don't have to own or invest in a server to store your documents, but are instead leasing space on one or more servers located in an off-site data center. While this definitely offers some advantages for smaller clients with fewer documents and little to no IT Support, it's not always the best option. Many larger entities prefer to retain physical control of their document server and documents will always load faster over the local network than having to constantly be uploaded/downloaded off the Internet.

**LET US BE YOUR *SOLUTION!***



# Document Management Savings Calculator

Investing in a document management system can pay off quickly both in time and money saved.

Complete the Document Management Savings Calculator below to get an idea of just how much money you could be saving per year with a modern office set up with a DMS like *Content Central*. Once the initial investment pays for itself, all of those savings in time and money can go towards important municipal projects that would've been out of reach with a traditional office.

## LABOR

How many employees take time out of their day to search, retrieve, and return documents from file cabinets?	_____	
		x
How many hours per day, on average, does each employee spend doing these activities?	_____	
		x
What is the hourly wage of these employees?	_____	
		x
Number of work days in a year?	240	

Professionals spend 5-15% of their time reading information but up to 50% looking for it.  
- PriceWaterHouse

TOTAL SPENT ON LABOR:

## PAPER

Number of copies made each day?	_____	
		x
Cost Per Copy (Ink, Paper, Toner)	\$0.08	
		x
Number of work days in a year?	240	
		+
How much do you spend on file rooms and cabinets in a year?	_____	

The average worker spends approximately 40% of their time managing non-essential paper documents.  
- PriceWaterHouse

TOTAL SPENT ON PAPER:

APPROXIMATE TOTAL (Add Paper & Labor Totals):

# About Us

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## About The Shumaker Technology Group

The Shumaker Technology Group was founded in 2007 with a mission to help our clients make better use of technology in order to streamline their day-to-day operations. We have extensive experience helping municipalities with their document management and website development needs. We are a Business Partner of the Michigan Association of Township Supervisors (MATS). We are a vendor/attendee at most Michigan Township Association (MTA) and Michigan Association of Municipal Clerks (MAMC) events.

We also believe in being active in our community. We are a Lansing, Michigan based company and are members of the Lansing Regional Chamber of Commerce, Mason Chamber of Commerce, Holt Business Alliance, and more. STG President Kyle Shumaker currently serves as the Vice President of Local First Mid-Michigan and is on the leadership team for the Business Networking International Okemos Networkers Chapter.



We pride ourselves on having quality in-house staff talent for everything from back-end programming to front-end and user interface development to graphic design to marketing. We have been in business for over a decade.



## About Ademero

Ademero Incorporated, headquartered in Lakeland, FL, is a computer-technology company that specializes in developing and supporting business software. Ademero serves customers worldwide.

Offering truly innovative solutions to capture, create, and manage documents, Ademero began in 2004 with the goal of making user experience the primary factor driving product design and development efforts. After extensive research and planning, and to answer the call of the market, Ademero created *Content Central*, the all-in-one, browser-based document-management solution with a straightforward pricing model.

Today, organizations in over 95 countries employ Ademero software as part of their daily business operations.

## Why does your municipality need document management?

Search your file cabinets as easily as you search the web.

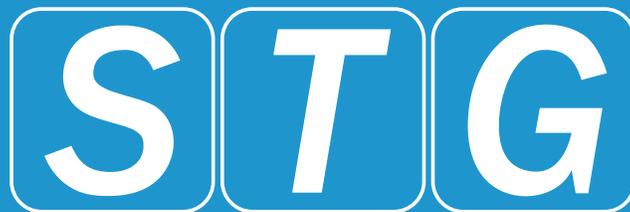
Make responding to FOIA requests a breeze.

Optimize the distribution and collection of forms.

Better distribute workload across entire municipality.

Protect important documents with file backup.

*And much much more! Find out inside.*



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