



# **Document Management Evolution: From Paper to Optical and Back**

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**In the beginning...**

**... there was paper...**



**... and more paper...**



**... and more paper**



# Paper

- ⇒ It was handled, processed and filed
- ⇒ Files were kept and became full
- ⇒ Cabinets of files filled the rooms
- ⇒ Public requests were time consuming
- ⇒ Managing the files took time

# Space: The Continuing Challenge



# '97 Epiphany: Let's Go Optical!

- ⇒ Find a document storage system
- ⇒ Buy a computer, software, scanner
- ⇒ Develop a classification schedule
- ⇒ Staff classify (or 'index') documents
- ⇒ Hire a temporary staff person to scan
- ⇒ Train temporary staff person
- ⇒ Staff QC the scanned documents

**Finally!**



# Welllll...

- ⇒ Ongoing document generation, indexing, scanning
- ⇒ Electronic document destruction
- ⇒ What happened to that ....?
- ⇒ Offsite storage; retrieval costs
  - \$2.88/box/yr
  - \$20 retrieval fee
- ⇒ Training staff for indexing/scanning

## Problems we found later...

- ⇒ The document scanning memory was limited (files would 'drop off' unknowingly)
- ⇒ The index schedule was inconsistent with document destruction dates
- ⇒ No way to 'batch' remove documents
- ⇒ Scanned documents in a proprietary format
- ⇒ Keeping documents we didn't need to

## More Problems we found later

- ⇒ Decreasing technical support for software
- ⇒ Not compatible with new Operating Systems
- ⇒ Staff don't use consistently
- ⇒ Only one or two computers with access
- ⇒ Can't transfer documents to another system
- ⇒ Inconsistent indexing
- ⇒ Not easy for public to use; and not frequent

# Practical considerations

- ⇒ Update document retention schedule-first priority
- ⇒ Factors to consider in decision to file or scan:
  - retention time
  - Who needs/wants access to document(s)?
  - How often?
  - Compare time need for scan versus file retention
- ⇒ Large agency versus small/medium agency
- ⇒ Who does the ongoing scanning?
- ⇒ Dept. system versus for agency system

# Where are we now?

- ➔ Identify new electronic storage system
- ➔ Revised Retention Schedule (proposed)
  - Inspection Records-6 years
  - HMBPs- Current + 2 years
  - UST Installations- Life of tank
  - UST Closures- Permanent
  - Site cleanup- Permanent

# Where are we now...?

- ➔ Re-evaluate what we need to keep and how long
  - Offsite hard copy storage:
    - Building related files (life of building)
    - Sprinkler systems, Fire alarm systems, etc. (life of bldg)
  - Onsite hard copy storage:
    - Inspections
    - HMBPs
  - Scan/Optical
    - UST Closures
    - Site Cleanup