



A Tradition of Stewardship  
A Commitment to Service

Agenda Date: 8/29/2017

Agenda Placement: 6N

## NAPA COUNTY BOARD OF SUPERVISORS

### Board Agenda Letter

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**TO:** Board of Supervisors

**FROM:** Jon Gjestvang - Chief Information Officer  
Information Technology Services

**REPORT BY:** Wendi Agans, Staff Services Analyst I - (707) 253-6133

**SUBJECT:** Sole source purchase of NEKO/OnBase integration software: Records Management and Accela;  
capital asset

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#### **RECOMMENDATION**

Chief Information Officer requests the following actions related to the Records Management digitization project:

1. Approval of Budget Transfer No. ITS002 increasing appropriations in the Records Management subdivision equipment expense account by \$7,650 offset by the commensurate decrease in consulting services within the same budget and establishment of capital asset in the amount of \$7,650 for the purchase of a server. (4/5 vote required)
2. A waiver of competitive bidding requirements and sole source award to NEKO Industries, Inc. of Roseville, CA for the purchase of OnBase Integration for Accela, Records Management Module software and implementation, and a server in the amount of \$69,605 plus applicable taxes, pursuant to County Ordinance Code 2.36.090.

#### **EXECUTIVE SUMMARY**

NEKO Industries is a systems integration organization focusing on electronic content management through various solutions, including the OnBase system. OnBase is the County's Electronic Content Management System (ECMS) currently being used internally for scanning, storing and retrieving files. The system is also integrated with several internal applications allowing citizens to access public documents, such as agendas, warrants and food facility inspections, via the County website.

Approval of today's requested action would allow ITS to continue working with NEKO using OnBase ECMS for further expansion into Accela land management software in the amount of \$15,000, while providing Records Management with record digitization software and implementation for \$46,955 and server rounding up to a total of \$7,650; total amount of \$69,605.

Additionally, ITS is requesting the approval of Budget Transfer No. ITS002, increasing appropriations in the Records Management subdivision equipment expense account by \$7,650 offset by the commensurate decrease in consulting services within the same budget and establishing the new server as a capital asset in the amount of \$7,650. Having worked with ITS on several ECMS projects, NEKO has a thorough understanding of County operations and requirements, therefore sole source approval is also requested.

NEKO is not a local vendor.

### **FISCAL IMPACT**

|                                   |  |
|-----------------------------------|--|
| Is there a Fiscal Impact?         | Yes  |
| Is it currently budgeted?         | Yes  |
| Where is it budgeted?             | Information Technology Services  |
| Is it Mandatory or Discretionary? | Discretionary  |
| Discretionary Justification:      | NEKO has the technical experience and thorough understanding of enterprise document management best practices. Continued use of their OnBase software ensure continuity. |
| Is the general fund affected?     | No   |
| Future fiscal impact:             | Future year maintenance costs will be budgeted in Information Technology Services and built into the Technology Cost Allocation Plan.                                    |
| Consequences if not approved:     | If not approved, the County will have to look for other ways to decrease physical storage needs and reduce duplication and printing expenses.                            |
| Additional Information:           |  |

### **ENVIRONMENTAL IMPACT**

ENVIRONMENTAL DETERMINATION: The proposed action is not a project as defined by 14 California Code of Regulations 15378 (State CEQA Guidelines) and therefore CEQA is not applicable.

### **BACKGROUND AND DISCUSSION**

Reducing paper usage has been one of Information Technology Services' (ITS) measurable goals. A key component of achieving this goal is having a clearly defined document and records management strategy based on best practices. Additional benefits include decreased physical storage needs, reduced duplication, lower printing costs, and increased efficiency through collaboration and direct access.

NEKO Industries is a systems integration organization focusing on electronic content management through various solutions, including the OnBase system. OnBase is the County's Electronic Content Management System (ECMS) that is currently being used internally for scanning, storing and retrieving files. The system is also integrated with several internal applications allowing citizens to access public documents like agendas, warrants and food facility inspections, via the County website.

November 8, 2016, the Board of Supervisors approved the purchase of OnBase Integration software for PeopleSoft Financial applications for General Ledger, Accounts Payable and Purchase Orders. The next step in expanding our ECMS is to integrate OnBase with Accela, the County's land use and community development software, and to purchase the Records Management module along with an Intelligent Data Operating Layer (IDOL) server. Accela software helps County staff manage land use and community development activities such as permitting, building safety, inspections and reviews, zoning, projects, and code enforcement. The OnBase Integration will allow documents to be scanned, stored and accessed electronically. The Records Management Module will allow the County to digitize all physical records, making them available electronically while securely storing, protecting and disposing of them based on legal requirements. The IDOL server will store the electronic data in an improved searchable format.

Approval of today's requested action would allow ITS to continue working with NEKO using OnBase ECMS for further expansion into Accela land management software in the amount of \$15,000, while providing Records Management with record digitization software and implementation for \$46,955 and an IDOL server for \$7,650, for a total total amount of \$69,605. Additionally, ITS is requesting the approval of Budget Transfer No. ITS002, increasing appropriations in the Records Management subdivision equipment expense account by \$7,650 offset by the commensurate decrease in consulting services within the same budget and establishing the IDOL server as a capital asset in the amount rounding to \$7,650. Having worked with ITS on several ECMS projects, NEKO has a thorough understanding of County operations and requirements, therefore sole source approval is also requested.

NEKO is not a local vendor. However, the company has extensive experience in systems and document/records management, having implemented OnBase at the County and many other public and private organizations.

#### **SUPPORTING DOCUMENTS**

None

CEO Recommendation: Approve

Reviewed By: Ben Guerrieri