

“ViewWise® Manages the Paper Chase at Will County”

by Greg Rapport

Records Management Office Will County, IL

A county Records Management Office provides a service for all other county offices that directly serve citizens. The job of a Records Management Office is to take all paper documents that need to be preserved, from all county offices, and implement a strategy to preserve them.

For many years, the law mandated that all permanent records be preserved on microfilm. When the law changed on January 1, 2001 to allow digitally scanned copies to be legal documents (*The Illinois Electronic Records Act*), the challenge to find a preservation system that would be both efficient and cost effective increased dramatically.

No one knows more about this challenge than Lynn Behringer, Director of the Records Management Office in Will County, IL. Lynn spent 19 out of the last 20 years as the department’s Director, with the mission of controlling costs while improving service to the other county offices and to the citizens of Will County.

When Behringer became Director in 1984, the Records Management Office was called The Microfilm Copy Department. Until 2002, the department had two basic functions. It made copies of documents for other departments (functioning as a printshop service shop), and it microfilmed documents (functioning as a filming service bureau).

Behringer’s department microfilmed about two million pages per year. They microfilmed all documents (organized in files ranging in size from three to 1000 pages) that had to be retained “permanently or for a long period of time.” After filming, one copy of the microfilm roll was returned to the originating department and one copy was stored for safekeeping at a separate, secured location. When any department wanted a copy of a microfilmed file or document within a file, it had to find the document on the roll of film and print it using a microfilm reader/printer.

Inherent Problems

Until 2001, microfilming was the only legal way to store records. With that in mind, Behringer had coordinated the most efficient filming strategy possible. Still, the limitations of microfilm left vast room for improvement.

For example, for a file to be complete, it had to be microfilmed in its entirety and in the correct page order. Filming a partial file meant that any additional pages would have to be filmed later, then either spliced onto the original roll of film, or stored on an addendum roll. This made the entire process labor intensive and subject to error. In addition, because of the process, microfilming could be as much as a year or more behind, while filers waited for files to be complete. What would departments do if they needed a copy of a document while it was waiting to be filmed?

One department that sent 250,000 pages per year for filming made three copies of every page before they sent the originals out for film. At a cost of \$.22 per page, (takes into account all related costs – paper, toner, labor, filing space, etc.) this department spent \$165,000 per year on necessary copies.

Compare that to a digital solution where the cost per page is a more modest \$.10. The same number of copies would have cost \$75,000, a savings of over 50%.

The Law Changes to Permit Vision

In Will County, IL, Records Management is one of the departments reporting to Joseph L. Mikan, County Executive. Mikan is extremely supportive of exploring technology options to lead county document management toward a paperless process. When the law changed to permit scanning to digital as a legally acceptable means of storing and retrieving permanent records, Mikan and Behringer compared the \$.22 per page cost for a paper copy with a \$.10 per page cost for digital scanning, and Mikan enthusiastically supported the idea to find and implement a digital solution.

In 2001, Mikan and Behringer began discussing the vision of a county archive facility to encompass record storage, filming, printing and imaging of documents. In June 2002, the vision became a reality when the former Microfilm Copy department changed its name and location. It became the Records Management Department, housed in a separate location, functioning as a true archival facility.

At that point, Behringer and her assistant Annette Boyd, began researching a digital solution that would enable the Records Management Office to cost efficiently evolve from a microfilming service to a digital solution service.

The digital solution called for the Records Management Office to be a Service Bureau and Imaging Service Provider combined. The department would continue to store all records. However, now, instead of a film-based storage system, records that require access would be stored digitally and made selectively available to satellite departments over the network by secure authentication.

In early September 2002, Behringer and her department began looking for a technology company that would provide this type of system. In addition to documents that had to be stored permanently, Behringer also wanted to include documents that had to be stored for three-to-ten years in the digital solution. She believed that would save the county even more money. Behringer looked for a system that:

- Provided easy and secure access to documents
- Deployed at a reasonable cost
- Had no underlying costs -- every alteration wouldn't require a high-priced, specialized technician
- Offered ease of indexing with options to add additional fields if required
- Required a relatively short training period and was easy to use
- Would be compatible with all other existing databases in the county

After carefully researching several options, Behringer and Boyd decided to try a pilot study with Computhink's ViewWise. "The deployment phase was very structured and efficient," remembers Behringer. "We had, and continue to have, meetings that include representatives from Computhink, our IT Manager and representatives from the various departments who need to access the system. Everyone works together and, so far, results have exceeded expectations."

One of Behringer's mandates was to get a system that would work with a variety of components. "I didn't want to be solely dependent on one vendor. ViewWise is a system that allows us to work with whatever scanner we want," she says.

The Proof is in the Pilot

By late September 2002, the pilot study began. One record series from each of four departments was selected for the study. The departments were all on different domains -- the ultimate test of compatibility. The pilot study lasted for two months. At the end of the study, everyone was enamored with the cost savings and ease-of-use ViewWise afforded. The decision to purchase the system from Computhink was unanimous.

Since then, the number of departments utilizing the service has been increased gradually and systematically. "Careful, calculated growth ensures that end users get the features and benefits they need from the system," says Behringer. "There are diverse needs, depending on the department. For example, we do the scanning in our location and index three fields for future retrieval. But if end users in a particular department determine that they need to index more fields for more specific query, ViewWise is flexible and serves the needs of the user."

ViewWise's scalability has turned out to be another invaluable feature. Will County's pilot study included four departments and lasted until the end of November 2002. By April 2003, they've more than doubled their service to include 10 departments, with a top end expected of 30 to 35 departments (or divisions within departments).

Calculating Value

"For the offices and citizens of Will County, this is proving itself a successful program everyday," says Mikan. "Each way you evaluate the program, you'll find savings. There are savings in the time efficiency of centralizing the scanning and retrieval process. There also are savings in space, labor and paper costs, since we no longer need to store mountains of paper. Specifically, there are two standout significant improvements, the service benefit and the cost benefit."

Behringer explains, "First, we've added the three-to-ten-year retention documents along with the permanent retention documents making the digital file much more complete and available to end users than the microfilm file. That's the service benefit. Second, the time it takes to enter a document into the system and retrieve it has been greatly diminished. That's the cost benefit."

The retrieval cost benefit results from comparing the time it takes to identify and print an image in a film-based system vs. a digital system. In a film-based system, as much as 15 minutes are required to: find the correct microfilm roll, get access to a reader/printer, thread the reader/printer, identify the target image on the roll of film and print the image. The fastest worker could locate and print a maximum of 60 requests in a day (averages to eight minutes per retrieval request over an eight-hour period). In a digital system, 60 requests can be retrieved and printed in one hour. An 88% increase in office efficiency combined with a per-copy savings of over 50% makes digital a very attractive alternative to microfilm.

Behringer concludes, "It's been very successful and can only go forward. ViewWise has met our criteria in every way. Sales and support from Computhink has been excellent, and we are effectively serving the needs of the residents of Will County."