TOWNSHIP OF EDWARDSBURGH CARDINAL
ACTION ITEM

Committee: Committee of the Whole – Administration & Operations

Date: May 8, 2023

Department: Administration

Topic: Purchase Filehold OCR Module

Purpose: To seek Council's approval to purchase the Filehold OCR module.

Background: Following the large digitalization/scanning project that was completed, staff discussed options with Image Advantage/Filehold to increase staff search time efficiencies and how to address files that were previously placed in the system without being properly scanned and saved via OCR (optical character recognition). Staff were informed that an optional module that was available but never purchased or implemented when the Township originally purchased and began the records management system is an OCR module.

The module provides OCR for PDF and TIFF documents that are already in the filehold library system and future files that may be scanned and placed in the system without being OCR'd before submission. The OCR'ing allows for the documents to be properly indexed and searchable. Once the module completes the process of OCR'ing the document, the system creates a new accessible version that contains the text layer that allows the document to be searchable when opened within the system or when exported for multiple purposes including, but not limited to; auditing, freedom of information requests, general information access etc.

With the implementation of the above outlined module, it would eliminate the concerns from staff and enable the file to be searched properly within the system if a file that is currently in Filehold or is added to Filehold was accidentally not scanned and saved as an OCR document.

Policy Implications: The Township procurement policy provides direction as it relates to sole sourcing the purchase of professional services/equipment. For the existing record management system to be compatible for the OCR module, they must be purchased through Image Advantage/FIlehold. Expenditures with a value under $5,000 do not require multiple written quotations and can be approved by the department head.

Financial Considerations: The Filehold OCR Module application has a one-time implementation/initial setup fee of $1,600.00, plus an annual licence/maintenance fee of

$320.00. This is an unbudgeted item; however, the money could be allocated within the administration budget to cover the implementation and annual fee. Staff would include the annual fee with the annual Filehold filecare fee in future budgets.

Recommendation: That Committee recommends that Council:
1. Purchase the Filehold OCR Module for a one-time implementation fee of $1,600.00, with an annual maintenance fee of $320.00; and
2. Authorize staff to execute the necessary Filehold contract updates.

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Clerk

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CAO