



**ADMINISTRATIVE MEMORANDUM**  
**COUNTY OF SAN MATEO**

NUMBER: F-4

**SUBJECT:** Electronic Document Management Systems Standards and Guidelines

**RESPONSIBLE DEPARTMENT:** Information Services

**APPROVED:** \_\_\_\_\_

*J. Matthews*  
County Manager

**DATE:** September 26, 2000

***Overview***

This policy defines departmental responsibility in the selection and implementation of Electronic Document Management Systems (EDMS). Electronic Document Management Systems include software applications that provide Imaging, Document and Information Management, Workflow process automation, Electronic Forms processing, Optical Storage, and COLD/ERM (Computer Output to Laser Disk/Enterprise Report Management).

***Background***

The Information Services Department, with the sponsorship of the County Manager's Office and review by the EDMS Standards Committee, has recently established standards and guidelines for the selection and implementation of EDMS. These standards and guidelines have been developed to ensure overall cost effectiveness and to allow for the implementation of a technology foundation from which the County can add technologies, as required, while ensuring compatibility of data and information sharing.

The San Mateo County EDMS Standards and Guidelines document is made available to all departments via the County's Intranet.

As technology evolves and matures, the various National and International standards governing bodies create and approve new standards and guidelines. The County's EDMS standards and Guidelines document will remain up-to-date to reflect those changes through a systematized process of review and evaluation. Routine updates to the on-line document will ensure that departments have access to the most current and relevant information.

## ***Policy and Process***

Beginning October 1, 2000, departments must notify Information Services of any plan to purchase and/or implement EDMS technologies. Project steps must include:

- 1) an analysis of business requirements;
- 2) a technology plan linked to these requirements; and
- 3) an implementation plan, including resources and costs.

An evaluation process will be conducted to ensure that the criteria for choosing an EDMS vendor follows established guidelines, that the products selected meet established County standards, and that best practices are utilized in both planning for and implementing EDMS technologies.

### Submission Process

Prior to the purchase or in-house development of Imaging, Document and Information Management, Workflow process automation, Electronic Forms processing, Optical Storage, and/or COLD/ERM (Computer Output to Laser Disk/Enterprise Report Management) applications, departments will submit a written memorandum to Information Services, Business Systems Division, outlining the department's business needs and proposed solution.

This memorandum must be received by ISD well in advance of any scheduled implementation, preferably before or during the Feasibility Study phase of the project.

### Approval Process

Information Services will conduct a brief analysis of the department's plan in reference to existing County guidelines and standards. A notice approving the plan will be submitted in writing to the requesting department. This notice may include additional information and recommendations. Copies of the approval will be sent to the County Manager's Office and records of the process will be maintained in Information Services.