



ABOUT FILEHOLD

FileHold document management and records management software is an off-the-shelf solution that ships preconfigured with user roles and an intuitive and friendly file structure that mimics the physical filing hierarchy of Cabinet / Drawer / Folders. The software installation is fast and easy compared to "platform" based products that can require consultation and IT resources often measured in weeks and months.

The software reduces the time searching for information, decreases paper storage costs, while increasing worker collaboration and workflow efficiency across the entire organization. Our standard software features and optional modules can transform your organization into the paperless office.

Implementing the TOMRMS and FileHold Solution in Ontario Municipalities

Introduction

TOMRMS stands for "The Ontario Municipal Records Management System" and is a file classification system created to define the documents of a municipality. It is the only file classification system developed in conjunction with the Association of Municipal Managers, Clerks & Treasurers of Ontario . It is comprised of:

- Classification / indexing system
- Retention schedule according to current legislation
- Policies for records management
- Procedures for records management

Marc Didemus of Image Advantage is a FileHold partner and works with these Ontario, Canada municipalities to implement a complete solution of TOMRMS and FileHold in order to manage their paper documents.

Problem

Municipalities are made up of a number of different departments such as: Clerks, Planning, Roads, Parks and Recreation, and Finance and Accounting. Many of the departments have to access or share the same documents. Each department tends to store the documents in their own individual filing systems so duplicate copies may be stored in different categories within different departments. With this duplication of documents, often they are not updated in other departments when a document is added to or revised in another department.

When one department needs to access a document from a different department it is very often difficult or impossible to find. Also, if a staff member leaves or retires it is very difficult to find documents that that person has filed and left behind. The problem of not finding the correct or most recent version of a document in a timely manner or at all can cost the municipality significant time and money from wasted staff time and litigation costs.

Actions

Image Advantage will do an on site needs analysis of the municipalities' documents including:

- The retention of the records based on legal, administrative and archival needs
- The security of the documents
- The workflows of the documents
- The indexing parameters

Once the assessment is complete, Image Advantage will provide a complete proposal to the municipality of the services provided including document scanning, TOMRMS, installation and configuration of FileHold document management software, phases, and cost of the project.



Solution

Once the proposal has been accepted by the municipality, TOMRMS is implemented in conjunction with FileHold document management software using a very detailed classification system with meaningful index fields so that the documents are well organized and easy to find. The TOMRMS classification for the documents includes:

- Department
- Document type
- Document sub-type
- Index fields
- Search parameters
- Security

A retention schedule is also implemented so that when documents reach the end of their retention cycle, they can be purged from the system or stored elsewhere.

Benefits

TOMRMS was created specifically for Ontario Municipalities in the early 1990s. Since then it has been fine tuned and updated over the years by actual municipal users. Currently, there are 130 municipalities in Ontario that have incorporated TOMRMS and multiple that have incorporated TOMRMS with FileHold document management software successfully.

The benefits of incorporating TOMRMS with FileHold document management software are:

- Having a backup of information in case of disaster
- Saves employees time in finding documents
- Frees up valuable office space
- Compliance with government and ISO standards
- Easy to distribute documents inside organization and to the public
- No more lost files
- Saves on wear and tear of paper records
- Reduces paper records filing costs
- Increases security to confidential documents
- Improves decision making in organization

"FileHold has the capabilities and functionalities required by most municipalities to manage their records while being simple to install and integrate and easy to use. All implementations are successful and the users are very pleased. The system works." —Marc Didemus, Image Advantage

"Since we instituted the FileHold and TOMRMS data storage systems, we have been able to reduce paper storage significantly and find that retrieving information is much faster." — Richard Bennett, Treasurer, Township of Edwardsburg/Cardinal and Image Advantage Customer

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