

### **Position: EDMS Consultant**

The City of New Westminster is seeking an EDMS Consultant to work with the Engineering Department to streamline and implement better records management.

The purpose of hiring a consultant is to determine the current state of the records management within the Engineering Department (excluding Engineering Operations) specifically focusing on the management of the electronic filing. To develop recommendations for streamlining and creation of consistent electronic and physical filing; to implement the recommendations and provide training.

### **Specific Requirements**

- Meet with the Records and Information Administrator to review the current organizational records management and electronic document system/policy;
- The work of the consultant will be to work within the City's existing record management structure;
- The consultant will work with Records and Information Administrator to optimize the use of the e-Docs by Open Text system currently used by the City to meet engineering's needs;
- The work is expected to be completed within 2-3 months period;
- Review Engineering Department existing filing structure:
  - EDMS, E-mails/Outlook Folders, Physical Copies, Photo Management, Shared Drives
- Schedule meetings with each of the group's manager and additional staff from the group to summarize findings on how each group currently handles filing (electronic/e-mails and physical copies) and share what they like/dislike about the current process;
- Once findings obtained, provide recommendations on how to streamline the process and make it consistent between the Engineering groups:
  - Creation of smart folders for e-mails in the same place with access to everyone
  - Streamline EDMS Engineering filing structure - simplify and merge some of the folders, identify consistent structure
  - Review naming convention (to mirror the physical files and vice versa) and document versions practice
  - Removal of duplicate files
  - Photo management

- Document the new/improved process;
- Create and deliver a training session(s) and tips to staff on identified issues: tips on electronic filing, managing the size and number of files in the inbox, consistent naming convention, photo managing, etc. and document the same;
- Transfer knowledge and provide training to Engineering EDMS Representative to maintain and enforce the same;
- Definition of Roles & Responsibilities for Engineering Records Management Coordinator, Admin Staff, Managers and staff at large to identify what is expected from everyone.

Note: The review of the retention, destruction of Engineering physical and electronic records is not requested here.

Please submit a proposal and resume to [bholtz@newwestcity.ca](mailto:bholtz@newwestcity.ca). If you have any questions please contact Brooke Holtz at 604-515-3828.