DOCUMENT IMAGING
BEST PRACTICES

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SESSION RULES OF ETIQUETTE

- Please turn off your cell phone/pager
- If you must leave early, please do so as discreetly as possible
- Please avoid side conversation during the session
- Thank you for your cooperation!
SURVEY

- How many are currently scanning?
- How many have a campus solution, but not scanning?
- How many do not have a campus solution?
OVERVIEW

- Advantages
- Record Retention
- Decision Points
- Implementation
ADVANTAGES

- Physical Storage Space
- Preservation
- Security
- Document Retrieval
RECORD RETENTION

- Institution Policy & Department Schedules
- Helps determine approach and scope
- AACRAO's Retention of Records: Guide for Retention and Disposal of Student Records 2010 Update
- Applies to digital records
DECISION POINTS

- Solution Considerations
- Day-to-Day intake & archival purposes
- In-house & Outsourcing
- Opportunity to “Skip technology”
- Off-site storage or destroy
SOLUTION CONSIDERATIONS

- Cost
- On-site vs External Hosting
- Integration with current systems
- Multiple solutions?
- Different based on document type
Ultimate Goal is day-to-day intake
Develop business process flows
Shared/centralized scanning station
IN-HOUSE & OUTSOURCING

- Students or Staff
- Cost
- Timeline
OPPORTUNITY TO “SKIP TECHNOLOGY”

- Images are only digital representation of paper documents
- Does scanning alone create efficiencies?
- Direct input of pre-system data
OFF-SITE STORAGE OR DESTROY

- Based on retention schedule
- Risk?
- Is it a comfort level?
IMPLEMENTATION

- Develop overall & individual project plan
- Define document types
- Define document statuses
- Establish security roles
- Establish verification steps
DEVELOP OVERALL & INDIVIDUAL PROJECT PLAN

- By Department
- By Document
- By Student
DEFINE DOCUMENT TYPES

- Every document type?
- Single student file?
- How do you want retrieved?
- System connections to checklists
- System connections to screens/forms
DEFINE DOCUMENT STATUSES

- Vital for business processes and workflow
- Routing to departments
- Communicating to students
- Satisfying checklists
ESTABLISH SECURITY ROLES

- Access to verification functions
- Access to documents
- Access to other features (annotations, redactions, comments)
ESTABLISH VERIFICATION STEPS

- Document Preparation
- Document Scanning
- Image Indexing
- Image Verification
THANK-YOU
Questions?