Records conversion is a service provided as part of the district’s records management program at no cost to departments. The Document Imaging team of the Records and Information department have many years of experience and expertise to help your department embrace digital transformation.

There are a few steps outlined below that we typically review when meeting with your team to discuss your digital imaging project.

# Records & Information Management

## Document Imaging Services’ 5 Step Process to Digitize Office Records

### Define the Scope of records to be digitized

Before we can create a work plan, we will need to view what your physical records environment looks like.

Location - Are your records stored in filing cabinets? In records storage boxes? On-site or at your field locations?

Volume - Do you have an estimate of the volume of records being stored? Lateral file drawer equals two records storage boxes.

Usage - Are the records being used by anyone in the office? Are they active (accessed daily, weekly, monthly)? Inactive (no longer being accessed)? What value exist within these files that should be made available digitally?

Compliance - What are the records retention of the various record series of the department’s records?

### Determine how to digitally store and manage data

ApplicationXtender is the electronic content management (ECM) system that can be utilized and is recommended to store your office’s digitized records. Factors to consider when deciding where to store your digital records include:

Complexity of your information environment

The higher the volume and complexity of your records inventory, the more likely you will need a more sophisticated platform.

 Metadata requirements

What type of search functionality do you need to retrieve the documentation? Basic index field data, key index field, utilize optical character recognition?

 Permission Controls

What level of access security is needed? Record group? Document level?

### Create a Strategy for Scanning the Records

Once we’ve determined the scope of your records inventory, we can make an informed decision about converting them. We have internal resources, skills and processes in place to handle your records conversion project. This includes digitizing sample files for review and approval of the project set up before moving forward to full scale production.

### Organize and prepare files for scanning

Transportation – We will arrange to retrieve and transport your records to our secure scanning facility. The records are securely stored until the scanning project is complete.

Document Prep – Document prep for scanning can include removing pages from binders, removing staples and other fasteners or holding devices, folding down corners, and making any necessary repairs.

Document Retention – Before we begin the digitization process, we will need to know what is to be done with the records post scanning. We can destroy immediately after scanning or hold for 30 days then destroy. The electronic record will then be recognized as the official district record. If the records retention is permanent or long term, the electronic images can be archived on microfilm.

### create a plan for Day-forward records

As we assist in transforming your office from paper to digital, we will want to develop a solid framework for your day-forward strategy. This determines how you will manage paper documents created and received from a certain date forward to prevent a new inventory of physical documents from being created

We recommend that the department implement an internal policy stating that any physical records created or received in the future will immediately be scanned and digitally retained in the ECM system. This prevents costly records management and scanning projects in the future and encourages staff to get accustomed to saving documents in a central, accessible location.

### Ready to Go paperless?

Contact the Records and Information office at:

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