



# Imaging Project: Local Government Compliance Files

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# Imaging Project

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- History
- Assessment
- Planning
- Evaluation and transition



# HISTORY

# History

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- Records to scan
  - Local Government Compliance Files
- Project discussed for the last 10+ years

# Benefit to Division and Agency

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- Increase response time to customers
- Correct database and file discrepancies
- Decrease mail/printing costs
- Disaster recovery



# **ASSESSMENT**

# Original Assessment

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- 2008 – Document Needs Assessment Worksheet
- Original numbers
  - 80 cubic feet
  - Over 10,000 individual folders – governments
  - 240,000 sheets of paper
- Met with vendor
  - \$14,000 + ongoing server and maintenance fees
- Project put on hold – lack of \$\$

# 2<sup>nd</sup> Assessment

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- Fall 2009 – new agency equipment discussions
- Project revisited
- Other divisions scanning
- Spring 2010 – purchased new copier with scanning capabilities

# Can we scan internally?

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- Researched options
- Checked contracts
- Assessed our own needs
  - Color vs. black/white scans
  - Single sided scans vs. double sided scans
  - Continued access to files during scanning



# PLANNING

# Planning

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- Cost savings
- Ongoing maintenance
- New procedures
- Test round
- Moving forward after approval

# Cost Savings

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- No impact on current copier contract or maintenance agreement
- No monthly limits on scanning
- Less box preparation time – fewer requirements
- More control over images after scanning

# Ongoing Maintenance

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- Increased server space needed
  - Possible increase of up to \$100/month
- Continued scanning growth
  - Estimated .25 GB each year

# New Procedures

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- Standardized file order
- Standardized file names
- Scanning process
  - File preparation
    - Purging convenience copies
    - Pulling out staples/paperclips
    - Labeling special files
- New data entry procedures
- Audit instructions

# Test Rounds

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- Test 1
  - 41 folders
  - 1/2 box or 39 MB
  - Prep time – 4 hours
  - Scan time – 1 hour
- Test 2
  - 148 folders
  - 2 boxes or 248MB
  - Prep time – 3 days
  - Scan time – 5 hours

# Moving Forward After Approval

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- Adjust procedures
- Projected timeline and scanning schedule
  - Based on test rounds
  - Estimated 1 to 1-1/2 years to complete project
- Quality assurance checks

# Starting the Project

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- Train staff
- Each analyst assigned a prep week and review week
- Test new procedures



# **EVALUATION AND TRANSITION**

# Evaluation and Transition

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- Encountered problems
  - Prepping errors
  - Labeling errors
  - Time management
  - Staff changes
- Transition to new Project Lead

# Improvements

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- Limited staff involvement
- Budget created for project
- Hired temporary staff
- Project timeline shortened significantly

# Training of Temporary Staff

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- Temp required training
  - File process
  - File prep
  - Data entry
  - Equipment
- Additional evaluation of process
  - More duties assigned to temp
  - Limited personnel- more control

# Ongoing Maintenance

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- Rescanning
- Continue quality control checks
- Scanning now part of our file process

# Project Status

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- 75% completed
- Anticipate completion by early December 2011

# Lessons Learned

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- Don't be too overzealous with scanning timeline
- Smaller the group working on project the better
- Double check box prep
- Expect to make changes
- Streamlined procedures