Antioch University

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3.235 Digitizing Records

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Type of Policy
- ■ *University*
- □ *Campus*
- □ *Department/Unit*
- □ *Interim*

Digitizing Records Policy

Policy 3.235

Business Management Policies	Effective date: February 27, 2010

Policy History:	Approved by:	Resolution #	Date:
	Board of Governors	2.27.10:16	February 27, 2010
Revised (Non-substantive):	N/A	N/A	October 27, 2017
Responsible Office:	Responsible Administrator:	Contact information:	Applies to:
Office of University Records	Director of Records Administration	937-769-1291	University and all Campuses

I.   Introduction and Purpose

All campuses and University units are expected to digitize documents and records in place of paper copies, and to store these records in one central location appropriate to their campus or to the University. Digitized records will provide easy access, and enable employees to retrieve, view, and print documents more easily.

II.   Conversion

To meet our goals of "greening" our campuses and the University, and provide better service to students and employees, Antioch University has invested in ImageNow software which allows for storage of information in a number of ways, including by campus, by document type, by name, etc., making the retrieval of records flexible and easy for any employee who has access to the information. This conversion also allows records to be selected based upon their creation date, which aids in the determination of the end of the record's retention period (see Records Retention Policy # 3.233).

III.   Advantages

Below are some examples of the advantages of digitizing:

A. While traveling on behalf of their campus, Admissions officers can view information scanned into the system by their office, which allows them to stay up-to-date with the progress of prospective applicants.

B. The Registrars' Office can retain digital copies of academic records either by scanning records as the student progresses, or by copying the student's file upon graduation. Digitized transcripts and narrative records allow for easy retrieval and printing. Turn-around time for student service and satisfaction improves.

C. Alumni officers may view information on past students, to help facilitate better discussions while asking for support.

D. Human Resources offices may scan and retain digital images of important employee records and departmental reports.

E. Provosts', Deans, the Chancellor's, and Vice Chancellors' Offices may scan important legal documents for storage, retention, and future use without jeopardizing the security of storage in paper format.

IV.   Timeframe for Conversion Process

It is acknowledged that conversion of our paper records will take time on all the campuses and University units. However, campuses and units should begin now to establish systems and a goal for full conversion by December 2012. It is acceptable for campuses and units to utilize Work Study students to digitize records, if the student signs the accompanying confidentiality statement. Supervisors should continue to use good judgment in the types of documents to which Work-study students are allowed access.

A central location will house all scanned and/or imported documents and records for users of the ImageNow software. The server will be backed up on a regular basis by the Antioch University Information Technology department, and the backups will be stored in a secure off-site location.

V.   Access

Access to the ImageNow server will be granted through an application process with the Records Administration department. Users are granted access to records through the University portal or web client interface, based upon their campus location and job responsibilities. Users must also sign off on an additional form, acknowledging their understanding, and compliance with FERPA while using this software.

VI. **Roll-out of IMAGENOW to Campuses**

    A. **Things that need to happen before an official rollout of ImageNow can begin:**

        1. ImageNow upgrade our server to the most current version of software

        2. Seat licenses must be upgraded to combo, prior to installation of the desktop client software

        3. Records Admin users will review the software changes, prior to writing basic documentation for campus users (2nd half of February)

        4. Development of training materials for ImageNow

        5. IT department to program the desktop button that allows a Colleague user to access ImageNow records from within a Colleague screen.

    B. **"Roll-Out" as a definition:**

        1. Installation of a scanner at the desired workstation. (campus PC Techs)

        2. The following services will be provided on-site by the University Records Administration Office through a three-day visit at each campus:

            a. Installation, set-up and testing of the ImageNow desktop client software at the workstation (must be a PC with a connection to the internet)

            b. Development of user accounts, and testing of individual functionality

            c. Review and establish document types, necessary for each office planning on using ImageNow

            d. One day of training in the user of the desktop client version of ImageNow, ImageNow on the web, and the Datatel icon that connects to ImageNow

        3. Ongoing discussion, development, and training will be provided by the University Registrar's Office once per month during the first year, then once per term in the second year and beyond.

    C. **Roll-out Schedule**

- **Antioch Midwest**
- Target dates: to be determined (first)
- **Antioch New England**
- Target dates: to be determined (fourth)
- **Antioch Los Angeles**

- Target dates: to be determined (third)
- **Antioch Santa Barbara**
- Target dates: to be determined (second)
- **Antioch Seattle**
- Target dates: to be determined (fifth)

Policy Cross Reference

Records Retention Policy	Policy # 3.233