Electronic Document Storage and Workflow Processing

Presentation to Budget, Finance, Audit and Technology Committee
September 2001
The District must embrace a strategy for electronic storage of documents for efficient document management.
Key Facts

✓ Enhances service delivery by making data available to users as needed
✓ Most cost effective as a “go forward” strategy
✓ Implementation is interdependent with the network and security strategy of CIO
✓ Enterprise-wide plan reduces training and support cost while maximizing interoperability
✓ Central headquarters relocation presents an opportunity to begin implementation
Three Broad Categories of Opportunity

- Enterprise/organization shared documents
  - Bulletins, Memos, Collective Bargaining Agreements, Charter School Plans

- Document Management within a major workflow/Mass storage
  - E.g., Personnel processing, accounts payable, student and employee records

- Office automation/workflow
Action Plan

Enterprise/organization shared documents

- Intranet development will facilitate implementation of enterprise-wide shared document repository
  - Infrastructure initiative by CIO will provide platform
  - Requires rationalization/organization of documents for effective retrieval
- Advantage of providing documents on demand to targeted personnel
Action Plan

Major Workflow/Mass Storage

- Targeting mass storage of student cumulative records first
- Will reduce storage requirements at schools and the Hill
- Will enhance retrieval of student records for all purposes
- Candidates for workflow process are being examined for phase 2
Action Plan

Office Correspondence and Workflow

- Pilot “digital office” in which documents are scanned and routed electronically
- Select an enterprise-wide software standard for interoperability and to facilitate support
- Ensure security of stored documents and retrieval only by authorized users
Action Plan

Headquarters Relocation Preparation

- Review all document retention requirements
- Initiate a document purge within offices
- Investigate opportunities for off-site storage of legally mandated records not accessed regularly
- Implement electronic document management where feasible
Questions?