Project Completed by:

EDUCAUSE
Industry and Campus Webinar: From Chaos to Collaboration: Strategies for Digitizing and Streamlining Records Management
Thursday, April 16, 2020
1:00PM – 2:00PM Eastern
Good morning. This is Jamie. I'm with EDUCAUSE and I will be your moderator today. I will give a brief orientation on the session's learning environment. Virtual room is subdivided into several windows. Slides are showing in presentation window. The window on the left serves as a public chat for all of us. You can use the chat to make comments, share resources, and pose questions to the presenters. We will hold Q & A to the end of the presentation and encourage you to use the chat until the end of the webinar. If you have audio issues click on the link in the lower left-hand corner. You can direct private message to technical health. A drop-down menu will appear you can select start chat with hosts and slides will be archived later today on the EDUCAUSE Website. I would like to introduce Grace Ding who is industry leading document moderator and serves 36,000 customers worldwide. She develops solutions and strategies for campus optimization initiatives. She has done conferences including EDUCAUSE and leverages automation technology to drive responses and quality services for student success. She holds 3 degrees in economics and literature from Claremont.

Grace: Thank you, Jamie and thanks for joining us today. I'm so excited to have Melissa Gonzalez with us today. She is the director of management at Houston community College system. She has her MS in information science with archives management concentration from a college in Boston and experience is working at national calvary and western history museum. She has worked at the museum of fine arts as well. In addition to many years of professional organization service she is a council member of society of [Indiscernible]. Today, Melissa will share with us how Houston community college systems turn chaos into collaboration by implementing electronic records management solution across multiple campuses that need assistance. Solutions have new policies and practices and 6 common information govern Nasse challenges including protecting vulnerable records and improving access to accurate and up-to-date information maintaining security and control and streamlining procedures with retention and compliance thereby simplifying work for staff. Fires and floods and security breaches and lost records and compliance violations combined with new challenges brought on by COVID-19 pandemic has more information on campuses than ever. I'm excited to hear what Michelle has for us. Before we head it to her, we want to throw a poll up on your screen right here just to find out a little bit about how your institution is currently managing records. A few options here, are you primarily using paper or storing in filing cabinets or digitizing records on local drives and file shares and digitizing and storing records in enterprise content records management solution or doing something else that you can specify in the chat? Likely, these options might be a little kind
of reductive that I imagine on most of the campuses, we are using accommodations of all of the different approaches. I am just giving you a few more seconds here to respond. It looks like pretty even responses so far. Sort of, you know, each option is capturing about 1/3 of attendees today, which is interesting. Paper and filing cabinets is taking the win a little bit. Nice. Very interesting. Okay. Well, thank you, everyone, for your responses. This is very interesting. With that, we will begin today's industry and campus webinar from -- Melissa, take it away.

>> Melissa: Hi, everyone. Thanks for joining us today. Before we begin, I want to ask a question. What are you most interested in learning from today's webinar? If you could, feel free to type your answers in the chat box. If it is a great thing that everybody mentions where they are coming in from. So, to get started, I will give you a little background on Houston community college system. We were established in 1971 and received accreditation in 1927 and organizational structure consists of 6 colleges scattered over 14 campuses in greater Houston areas. We have 85,000 + students and 6 colleges and 14 campuses and office records management had been using [Indiscernible] for about a year and a half. Challenges and chaos. Dun, dun, dun. What were things like before? This is before [Indiscernible] shut several years prior. We have unorganized and obsolete files that were on desktops and third-party applications and departmental silos. Departments that the colleges operated as individual departments acquiring their own software applications without records management control or IT support. There was no consistency across the systems. Our legacy system provided a way to sift manically identify records eligible for destruction. Lots of retention were already expired and we were out of compliance and system had inconsistent indexing throughout. Very limited metadata. It wasn't at all. We had e-mailing archive that hadn't been destroyed or gone through and we cleared 120 e-mails per year and was increasing and that was with staff and faculty e-mails alone. Catalyst for change, made the news because records were found in a Dumpster near one of our campuses and we hired outside consultant to work on the department and that audit resulted in 21 findings and surveys completed by staff and findings showed we were extremely out of compliance and records weren't properly stored. Consultant hired provided recommendations to each finding as well as [Indiscernible] for a report for us that later informed policies and procedures and strategic plan for moving forward. We started to use image now in the mid months but used it for imaging and department didn't use record management component it had. There wasn't accessibility across the system. We did a system inventory to see what records we had and what was being created and what systems and applications were used by departments and learned to handle convenient copies and became official record when official record was destroyed which could be potential compliance issue and determined that some departments on different campuses were using different processes and forms and using redundant applications and no uniformity across any of the campuses. The office of records management manager and sole records manager at the time went out to departments focusing on nonacademic and those creating the bulk. District office which is where administration and chancellor and foundation are housed and student services provided big takeaways mainly business plans with file retention that would later be building block for file structures within laser fees. Took 6 to 7 months to complete face-to-face meeting with most departments. At end of it they hired a
consultant that would build a system from scratch for us. Didn't receive too much buy-in with too many potential technology issues. That was history not future. Story I shared is where we were prior to 2016. Records manager that conducted systemwide inventory. She is a senior records management specialist that completed monumental task with manager and two work study students I'm impressed with how optimistic she is given where the department has been. Thankfully, we decided to go digital. We had changes for the better. Leadership and current records management environment had to change and they tried to fix the old system and start over with the new system to meet changes we were facing and not maintain retention schedules as stated earlier an decided it was more work to clean up the legacy system than it was in current state to get an entirely new system. Office of records management started to look for systems that would help identify records of business value and retention schedule and declare documents as records and store documents for each department's needs and needed a system to manage different levels of compliance which meant balancing state and federal retention laws and being mindful of different departmental compliance requirements. Regarding state and federal and accreditation regulations, as a public entity we had to adhere to commissions and local schedule J is C that is retention schedule for public colleges and junior colleges and FERPA and Title IX and HIPAA and accreditation needs for each college. For example, coalman college of nursing had records recommended to keep for 3 years and accreditation demands they keep them for 5. We have ability to alter retention periods that [Indiscernible] suggests based on department's needs and need to send them an update so they know what we are doing on an annual basis. Choosing solutions, office of general council office records management reports to decided to search for a director instead of a manager to oversee our records management program. My predecessor was hired as a director developed strategic plan to build a records management program. Vision and strategic plan included student success innovation performance excellence and organizational stewardship. Our chancellor is big on creating a paperless system. We knew we needed to get something new. It had to be able to [Indiscernible] as well. My predecessor's previous job was in academic -- fees and was familiar with it and brought [Indiscernible] on site for a visit and records demonstration. Attended the site cyst and we received Greyed great feedback and we moved forward with it. Why laser [Indiscernible]. It would give us and them ability to access and search and share records. They understood our needs and it out of the box ideas that gave Abell to easily monitor retention and track and destroy records in a timely fashion. We needed that system to integrate with current business applications and for example people soft SharePoint and Microsoft office and big bonus is they provide regular user training and user groups with state and by industry and there is a ton of online resources. The plan was presented to the board of trustees to approve of it. We did not need to issue an RFP. Land uses are part of the Texas cooperative. E-mail suite destroyed 58 million of 121 million e-mails found in systemwide inventory. 4-year retention of e-mails to help prevent it from happening again. Microsoft 365 and for staff and e-mails that retention was more than 4 years directly into less keystrokes for end users indexing student employee records and happened on back-end via workflows and metadata. Moving forward with implementing laser Fiche. When we brought them onboard we needed plan of attack. Legacy system department and bulk of records and big heavy hitters and financial aid departments we worked around their peak registration schedules.
for migration and out of the question to migrate in late summer, fall, winter, and spring. Helped
to dictate the schedule and it consisted of 18.5 million pages into laser fiche which built out a
records plan and where system inventory came in handy to provide plan to have template for
those. Engineers started off with that. They trained the project team to continue to move forward
with buildouts once project closed out. They had a trainer session with office of record
management staff to learn and train staff when we O-Ne boarded our own later and set up
training schedules on Tuesdays Wednesdays and Thursdays for in-person training and we did
training for records management specialist and technology and project analyst. Office of records
management knew it would be aggressive timeline it was in April 2016 and found contract by
August 2016. Goal was 1 year to complete migration and legacy buildout. We met and went life
with departments in January of 2017 and used winter break to onboard -- all the while, new
image now migration was happening simultaneously. We closed the project out in October 2017
after having added 12 more departments into laser fiche. Most legacy departments with total of
20 onboarding groups and conclusion of the project ended up to be a great team-building
exercise. We had many benefits of switching to laser fiche. These are the top 4. We had an
administrative system for records management. A central repository for record-keeping purposes
to use regardless where how many departments you had per each division scattered over 14
campuses and everybody could access same records and destruction of records, we could easily
identify records retention had expired. We could ensure authenticity and security and timeliness
and increase business efficiency by lowering physical storage space and cost and paper and
electronic and reduce cost of store records that are off-site warehouse and better utilization of
cabinet space and less ink and toner was purchased. To minimize risk greater security active
control and managing who, what, when, and why records were accessed down to a document
level and could better protect personally identifiable information and improve integrity of
records with audit requests that we ensure to be complete and accurate and provide records to the
students. Regarding greater policy compliance requirements of governing bodies to ensure
government funding and accreditation for institution. Go and beyond digitization collaboration.
They knew this was a campus wide effort and project was completed in 2017. We developed a
process same lair to laser fiche plan. We mapped out processes and gathered information from
them. What records did they create and how did they organize them? Terminology -- compliance
or regulations that respect the retention do we need to add or subtract a few years or not keep in
laser fiche at all they have 1-year retention effort. They can monitor that on their own and check
with them later to make sure items are destroyed. We keep track of that also through a -- we have
a smart tracker. We can use info gathered to create business file plans. From there technology
and project analysts build project out into laser fiche. They provide demonstration to the
department to see what it looks like and how easy it is to use in laser fiche and review process
and on their own time and stage of user testing. We give about a week to play around in the
sandbox and check in and see how things are going and ask if need to make changes and meet to
discuss changes and protect and make them in laser fiche. When they approve of them,
department goes live. We find out who accesses laser fiche with the department and level of
security they need and ones migrating records into lacer fiche and do they need read-only access
and determine licenses and how many departments there are as well. Strange and regardless of
size of the department there is not a way to predict how many licenses people will meet. For example, I might have a department of 5 people. All 5 need access and might have department of 10 and only two people need access. It has been a learning curve in that area. It is easier if we can consistently say a group of 5 to meet 2 and 3 and estimate how many licenses, we need each year. That is not the case we are good and covered and laser fiche is amenable to adding licenses throughout the year if we need them. Beyond records management. Big 4 student services groups: Financial aid, admissions, internal student services and veterans affairs. There are federal compliance rules requiring documents from students services department intake and process documents severed from students into laser fiche. Admission transcripts are captured in laser fiche by making them accessible. Enrollment and everything is seamless and all departments can see what each other is doing and they can talk and communicate and collaborate with each other more clearly regarding student records. Students services benefits and how do they benefit from us getting laser fiche? I said earlier we have 14 campuses and because of this before when siloed records and systems are not always current and standardized we will travel between multiple campuses to get assistance they needed because one department didn't have what another had at another location that kind of detours from the whole experience of enrolling and becoming a student. With laser fiche admissions and financial aid were able to provide better customer service because of -- access same student records regardless what campus they were at. Laser fiche gave us means to allow students to enjoy an academic experience without processes that were out of their control. As such we have been approached by departments to use other applications to streamline and automate business practices even more. Financial aid reached out to us at end of 2019 about using Laserfiche. For technology and project analysts for financial aid if 2020 and hit the ground running. Financial aid attended Laserfiche. We are hoping they will be able to kick off using those for fall enrollment during late summer. We have ambassador for office of records management via financial aid and hoping their successes will help us convince other departments to use forms as well. Right now, a lot of departments are using unreadable PDF. You have to print out, sign, and scan an e-mail and print version and for next signer or step to happen. It needs to change for business continuity and compliance to reduce number of convenience copies. Now you have signed copies of forms in various departments if form has retention schedule to need and destroy you have other forms in other departments that exist. We want to reduce the convenience copy issue. What we have learned and future plans. Now that we are working from home due to COVID-19 we are seeing how necessary a system like Laserfiche is. They were moved from rack space to our own location located outside of Houston IT and project analysts have worked with servers remotely. Compliance and web and Microsoft windows authentication. People can access at home using VPN. Office and records management tests and analysts adapted a training program to WebEx and have successfully trained clients remotely. We conduct onboarding meetings with department remotely from conference room via X5 true touch screen and we transferred process to WebEx to conduct the meetings. Management specialists are using WebEx due to information gathering meetings with their departments and we meet as a team and staff to go over those and manage projects twice a week and via e-mail and text as well. All of our departments using Laserfiche and excited to work from home. From a risk management perspective and thankfully the risk management
Digitization is only the first step towards digital transformation. We are trying to move beyond using Laserfiche to transfer records. It has useful needs for automation and business processes when situations like this arise or if we have another [Indiscernible] or situation where we are away from our offices. We are very lucky in that the office of records management is nested under office of general council and usually when I worked in institutional archives in previous locations it has been difficult to get buy-in from people regarding records management programs. I have to use legal ramifications to get people to understand that. Thankfully our office of general council already sees that and acknowledges that is an issue. The commission and records retention schedules and guidelines help tremendously as well and maintain buy-in they are authoritative body and we have to understand we have to comply with those. At the time we were looking for a system, vice chancellor for IT was a huge advocate for our department and had background in records management for about 10 to 15 years and maybe more and saw need and provided us with IT resource that is necessary to meet our goal and had foresight to seek potential in the system and great to attend Laserfiche symposium and power and really saw it as a great system and wanted to see it implemented more widely throughout the HTC system as well. The only one I do now is I would have asked for the contract we signed with Laserfiche initial contract to be created a little differently similarly to how we set up people soft not [Indiscernible]. It is defunct and current setup is difficult to create new projects in Laserfiche. It is not impossible but requires many budget approvals that could take months to finalize and I would have excluded more buckets of engineer hours to assist with issues we can't solve in-house. Our technology and project analysts are goal-certified in Laserfiche. I'm 2 classes away from being gold certified and will be platinum after that. I don't introduce myself daily on the back end. I have enough IT knowledge to be dangerous and able to successfully communicate those departments as well. It helps tremendously. Lessons learned. We now have more departments onboarded than the 20 here. We are working on more and I will get to it later. No. 1 is C-level support and commitment and ongoing support are crucial especially for resources like funds and staff. I have seen earlier office of records management started with one manager and full-time staff member and we have director for [Indiscernible] and one nonschemetive employee that accounts for two senior records management specialists and two technology and project specialists. What is great is during inspection of Laserfiche in 2016, everybody was included in the training. Even a records management specialist, they don't build out or work on the back end with Laserfiche either, they ran training programs for HTC staff and are familiar with Laserfiche as well. We were able to involve key stakeholders from the beginning and had a steering committee with those most impacted by change in management, especially IT to gain buy-in and big heavy hitters and student services and able to identify custodian records and contact for each department to be diemakers throughout the process to move forward and able to understand department needs before migrating records and system inventory helped tremendously and able to make decision not to onboard during middle of peak registration because we communicated with the department and prioritized based on what they were able to do at the time. We agree upon downtown time to not -- minimum operations and we
still do that during finals or registration and we know that certain departments won't be accessible for others at that time for meetings and onboarding and able to set standardized naming conventions from the legacy system and able to standardize forms and document names across colleges for same department and regardless what campus they were located on they used the same taxonomy ensured quality and consistent data in Laserfiche with the new location. Now that we implemented Laserfiche and we have many departments onboarded, we decided to move forward and implement business process automation through eForms or forms total as I said earlier financial aid is using Laserfiche forms and streamlining business processes. Using as guinea pig and sets example to encourage departments to come on board as well. Current situation working from home will drive the need for this even more so. It is horrible this is -- it came to this to be able to convince people it should be a priority. People rely on paper forms so much, but I think that if anything, it brought our attention to it even more. Some of the standardized forms platform records management and next level and regarding essential records Prague ensures business continuity during disasters. Before we had the two technology and project analysts we were falling behind schedule onboarding departments on our own after Laserfiche implementation project had ended. We have gone from two full-time staff members to 6. We were understaffed with 14 campuses. Many out there can relate. Engaged Laserfiche for records management project that will be completed by August 31st this year. Information gathering sessions happened in August of last year. We were able to conduct some of them remotely and not able to meet in person in September and in October. Everything else has been done remotely since then and continue to do so from home. User testing meetings and demo meetings we have been having these past 2 months and lots of them have been happening in late March since we have been working from home. It has been very useful and simple surprisingly enough. It has been very encouraging we can do this remotely. Community colleges don't have college archives at this time. I'm working to build one and essential records program to preserve and provide accessibility for records with longer than normal retention period, say 10 + and permanent records and materials. We have anniversary coming up in 2021. Library is engaging in digitization project and images of meta data and are using content DM right now that stores to make them accessible via the web. Right now, they don't have a way to digitally preserve those images. Laserfiche does run audits over digital material and current system is based on retention and destruction not on maintenance of digital files over long-term periods. We needed a system that offered that and sustainable needs of preserving records from ISO standards and open archival information system and power 2019 over a year ago and able to propose a statement that meant work met all of my needs and created a public portal to create online stupidities using digital materials using Laserfiche and [Indiscernible] fashion archive and use the web portal instead and it would save them more money as well. It also would allow Laserfiche as a collaboration tool between chancellor and board of trustees to provide access to a searchable database of board materials and [Indiscernible] control. It would [Indiscernible]. All of which align with the chancellor's strategic plan. That concludes my presentation.

>> Thank you so much, Melissa. Folks, we have plenty of time for questions. I see some coming in the chat right now. We will get Melissa and Grace up on the webcams to start answering some
questions. Any questions feel free to [Indiscernible] even in middle of answering something. Hello, Melissa and Grace. Thank you so much. Melissa, can you jump us off with some of the questions?

>> I'm still on mute. Fantastic job, Melissa. Lots of information in there and good questions coming in. First question is from Alan. What about banner document system versus other records management system? This one maybe but Melissa, do you have experience with the banner system?

>> I don't if you want to answer that.

>> Grace: We work with a few institutions using Laserfiche and banner in tandem to management records. Experience that we found is banner system is great with handling a structured document and records that come into your system. Transcripts maybe and other types of documents like that and there is unstructured information that is tossed around on campuses and miscellaneous and supplemental documents on a case-by-case basis. Lots of times that type of information is a little more difficult to capture within banner because banner is a record board for really structured types of information. Hopefully that helps from at least our experience working with it. We have a question from Katie. Does -- I think does Laserfiche meet accessibility requirements? Does this topic of accessibility come up during the course of deploying or picking the solution?

>> Melissa: We have not had that conversation yet but haven't had -- if talking accessibility from a disability standpoint with captioning? I found OCR elements of Laserfiche help with that tremendously. Other than that, we have not really encountered an issue with accessibility yet. My understanding is Laserfiche does have that capability as well if you needed to have things read out loud. Not sure if it has ability of doing that.

>> Grace: Yeah. Maybe I can add some other details. We do get this question a lot. It is often a combination whether solution provides and how you deploy it; right? We do have -- we are compliant with, you know, the W tag and other types of documentation around accessibility for a lot of specific things like the ability to read text out loud. I believe that we integrate with solutions that do that. It is not native to solutions. If required, it is part of your institution deployment and we integrate with solutions that do that. If you have more specific questions, feel free to ask those. I can try to address them. All right. Next question from Jill. What is the relationship and processes with university archives for permanent records?

>> Melissa: Thankfully I'm building the college archives right now. I'm creating lots of foundation for that. Collections go finding aids and templates and what should and shouldn't go in collections and I'm building college archive and thankfully I'm doing that as part of office of records management and it will be more seamless of a life cycle. People are familiar with me already working with records management. They tend to listen, which is very useful. I worked at
systems where the university archives and records management -- university archives is special collections or library, university library and you have a records management system that is out of a provost office of all things. It made it extremely difficult to get at that point a retention schedule that everybody agreed upon. We couldn't move forward on maintaining records and destruction let alone that. It is nice I can dictate retention cycle and having information gathering meetings with the department. I can ask them then, what materials are you collecting you consider more historical that are not on retention schedule. Records management is concerned and retention schedule dictates everything and what goes into Laserfiche. In fact, one of the more frustrating elements is people thinking Laserfiche is Dropbox. I have to tell them it is active versus inactive records. Inactive records go into Laserfiche. That helps being able to have that communication with people during information gathering meetings. I can make a list what they are creating to fit under university archive guidelines not necessarily records management guidelines which is something I have to work into processes for whoever comes after me as well.

>> Grace: Okay. Thank you. That was really detailed. We have another question from Patrice. How are workflows different from other departments?

>> Melissa: I was intimidated when came to workflows until I took the gold certification training. It is user friendly and if you make mistakes it tells you where you make mistakes and ways to check workflow as you do it to make sure steps are running smoothly and accurately and ways of testing that in the tester environment before going live. There is ways of doing quality control and checking everything in-between. What is wonderful is we can use workflows as templates for other departments. Those departments have similar needs in what is happening and show how it works with one department and show layout and workflow on back-end. They can tell us what needs to change and be added. It is easier than starting from scratch each other. Is the business library part of Laserfiche's online resources. They have templates available there too. It is great. You don't have to [Indiscernible] each and every time especially if you have departments operating and willing.

>> Grace: Follow-up question: You have technical information staff on your team. Are they ones building your workflows or combination of clients working workflows or how is that working?

>> Melissa: They do the majority of the work. We work with IT for server access and issues on sequel side of things. IT and project analysts build workflows and communicate with the departments and they come with us to information-gathering meetings also to start formulating plans and outlines for workflows. It is great. They are there from the beginning. After we do information-gathering and it turns over to them, they have all of the information they need to move forward or schedule another meeting with the departments, they can do that as well. It has been nice having them on staff.

>> Grace: Got it. That makes sense. Question from Robert. Have we done conversion from dock star to Laserfiche? I'm assuming you haven't. Off top of my head I can't think of any specific use
cases. If you have specific questions, e-mail address is on the screen. Feel free to follow up. I can find out more information for doc star. Another question: For which documents does it use OCR for.

>> THE PROFESSOR: Melissa: OCR has hand-written documents. There is option when ingesting records if you want to keep it on or off at all times and there is a toggle part of the template information when you do that. Metadata is usually standardized. OCR is handy when you are using quick form. Other Laserfiche products as well. And also for searchable the. We search that way. It is nice for advanced search with student ID number and brings everything up for that student or department with the ID number on it. It is great for finding particular items that were in previous board meetings and we use it all the time for litigation holds to find information regarding particular employee or student and information numbers and information for that and put it on the records. It is great and OCR is wonderful for searchability. I also know [Indiscernible] and you have to add it.

>> Grace: I know lots of campuses run reports from the repository. Lots of that OCR information can actually be searched on and compiled to give more of a report on that.

>> Melissa: Yeah.

>> Grace: Another question from Robert: What is the cost per user? Do you know that information?

>> Melissa: That is a good question. I haven't found the map. Changes every year. More departments we onboard, more licenses we are using. Like I said, it is not consistent between departments and how many users you will have. It would be helpful if I could say I have X amount of departments and how many staff members they have in each one. I will need 2 or 3 for this one ahead of time. That way coy do the math and figure that out. Right now, it -- yeah. It changes based on license users right now.

>> Grace: Okay. No worries. Maybe Robert can follow up with you directly too.

>> Melissa: Yeah. For sure.

>> Grace: Perfect. Shannon is asking is records management program different from data governance program.

>> Melissa: Technically no. There is not much talk about data management and governance. We work with IT about that. We are not a research. We are a community college and not a lot of research that is happening and not a lot of data being produced that ownership wise you run into a big data issue or research data issue. I'm hoping we can issue guidelines and requirements for data governance at the college soon. We have some -- trying to remember what we call them.
Workforce solutions and college of nursing and we have visual arts and a few others that train people vocationally for specific jobs. Those people might be doing more where they are purchasing data that we should have more control over. I'm hoping now that we established -- it has taken us a year and a half. Well, since I got had here, I guess. In a week or two, it will be 2 years officially. 3 years officially. Oh, my gosh. I just had it. 2 years officially. It has taken about a year to get that system set up of us needing the onboarding system set up. Now that is done and my staff can take off with that, I can work on the bigger issues such as data governance which is online agenda as well with essential records program and records management and all that.

>> Grace: What applications feed into Laserfiche and do documents start out from Laserfiche to the point of creation?

>> Melissa: Now that they are formed documents starting in Laserfiche from the creation. Created in Laserfiche and back-end approval goes to signature and approvals and rerouted back to Laserfiche once it serves its purpose. That will be wonderful once it is fully implemented and done. Right now people soft feeds into Laserfiche. Trying to think of something else. There is applications that people are using as well and we are trying to get to integrate also into Laserfiche. For the most part, we use people soft to import and migrate records for students and employees.

>> Grace: Are there schemas or specifications for meta data?

>> Melissa: We set that up. That is up to you and your -- I guess what taxonomies you want to use. I think we use mon. Laserfiche has anything they prefer people use for metadata or leave it up to each.

>> Grace: We leave it up to each company. Yeah.

>> Melissa: It is up to you. I would say once you pick one, be consistent. When you work with departments for information gatherings, just, you know, asking them how would they search for records or create records what terminology do they use and go from there.

>> Grace: Makes sense. Couple questions about cost and if you want to know what Houston-Specific Plan you can reach out to Melissa or questions about cost in general about Laserfiche, reach out to me. Depends on a lot of things type of users you have and types of deployment. There is capabilities and automation and all that makes a difference and hard to give a sort of one answer. Yeah. Feel free to reach out to me. Eugene is asking, did you encounter any kind of tech nail challenges throughout this process you could share?

>> Melissa: During initial implementation, there are none I'm aware of. I read reports from that from my predecessor. I know now one of the issues we have run into from that initial implementation, so not at the time but now looking back at some of the workflows that were
created, we are having now a destruction issue in sense that if we audit to look for items available for destruction. Metadata, we have to go in and tweak the end date. HTC allows students to reenroll after a set amount of years. We can't exactly get rid of certain information. We have to work with the department saying, sure. They can reenroll after not having been here for quite some years. Retention says that we have to get rid of documents, we will try to get rid of documents working with departments to figure out a way to do app meta data so not destroying records they need or might need in next few years if student decides to come back and won't have to start over again. That is the only technical issue as far as the templates go but it is easily fixable.

>> Grace: Awesome. Thank you. This next person I might be able to start off with and you might be able to add. Does Laserfiche has digital signing or integrate into A- dabo or DocuSign software we integrate with most of the signature platforms out there. Adobe eSign and DocuSign. Melissa, are you using eSignatures?

>> Melissa: I believe we are using DocuSign for forms.

>> Grace: We have a lot integration. All right. I think we have time for maybe one more question. Let's go with this one. What is 1 piece of advice you would give to someone who wants to implement electronic records management? You can only pick one.

>> Melissa: Definite buy-in. Legal and working from archive standpoint implementing records management system, people don't understand the seamless or life cycle should be seamless. I have been having to especially from a with science background and archives background, my boss at first constantly wasn't understanding this is not a library. I understand it is not a library. I had to explain it librarians are concerned with access first. Archivists are interested in preservation first and access second. Records managers are all about destruction. It is a way of providing access to records that are inactive until they are destroyed. Then also being able to evaluate when the records should be kept permanently and being able to make this decision and being able to convince stakeholders that is what needs to happen and why. If you have buy-in already from let's say legal which, again, has been very instrumental in getting all of this done and IT. Make friends with legal and IT. Have meetings and provide cookies and food always goes together I find. Now that we are virtual, I have been having happy hours with groups or coffee breaks with groups to be able to talk with them introduce yourself. There are ways of doing it remotely even, you know, we are in that situation now. We have been doing coffee breaks and things of that nature that is helpful in meeting people and seeing faces and getting to know them. You don't want this contact. It is cultivating relationships and keeping up with them and not letting people forget you are there and you are not just there to dictate what happens and when but there to help them and they are there to help them clean up records clogging up offices and doing those things. You are managing up and out. So just being able to do that and find a balance.
>> Grace: Perfect. Thank you so much. I think that is it. Thank you again for the presentation and for answering everyone's questions. We will hand it back to Jamie now to close out.

>> Jamie: Thank you so much Melissa and grace. Great content. On behalf of EDUCAUSE thank you for joining us for the discussion and conversation. The session recording and presentation slides will be posted to the Website later today. Feel free to share with your colleagues and please join us for the next industry and campus webinar on Thursday May 7th. On behalf of EDUCAUSE, this is Jamie Farrell. Thank you for joining us today

End of Webinar