



ASTR/AMS ADVISORY

ASTR DIGITIZATION WORKFLOW

OFFICE OF ARCHIVES, STATISTICS & RESEARCH



SEVENTH-DAY
ADVENTIST CHURCH

PROCESS



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PREPARATION

- Box Creation
- Data Entry
- Generate Cover Sheet
- Cleaning



BOX CREATION

Acquisition

- Box arrives or acquired from GC Departments with files and documents.
- Department/individual delivering new box completes form to indicate contents

Storage Location Determined

- VAULT: Space identified in Vault for storage and location noted for User Box number.
- WAREHOUSE: Versatile checked for last Warehouse User Box number used (e.g. WH 4435)

Box Data Entered & Label Generated

- Each file/folder within a box is added to Versatile (Records Management System)
- Label is generated for box



BOX INTAKE FORM

		<h2>Records Transfer Form</h2>	
Name of Transferring Department/Entity:			
Restriction to Use or Access: <input type="checkbox"/> No <input type="checkbox"/> Yes, please explain:		Media Format (Please check all that apply): <input type="checkbox"/> Paper <input type="checkbox"/> Microfiche <input type="checkbox"/> CD/DVD <input type="checkbox"/> Microfilm <input type="checkbox"/> Other: _____	
		Alphabet Range: From: _____ To: _____	
Box Contents:		Year of Contents: From: _____ To: _____	
Box ____ of ____	Special Notes:		
Person Transferring Records:	Ext:	Email:	
Signature:		Date:	
FOR OFFICE USE ONLY			
Transfer Received By:		Date Received:	
Retention Status:	Box #:	Accession #:	
Scanned By:			

- Important Information to Capture:
- Originating Department
 - Media Format
 - Content
 - Year Range (e.g. Span 1974-1978)




DATA ENTRY

- Each file/folder within a box is entered in the Records Management System (Versatile) as a new record.
- Coversheets are generated from Versatile for each file/folder to be scanned

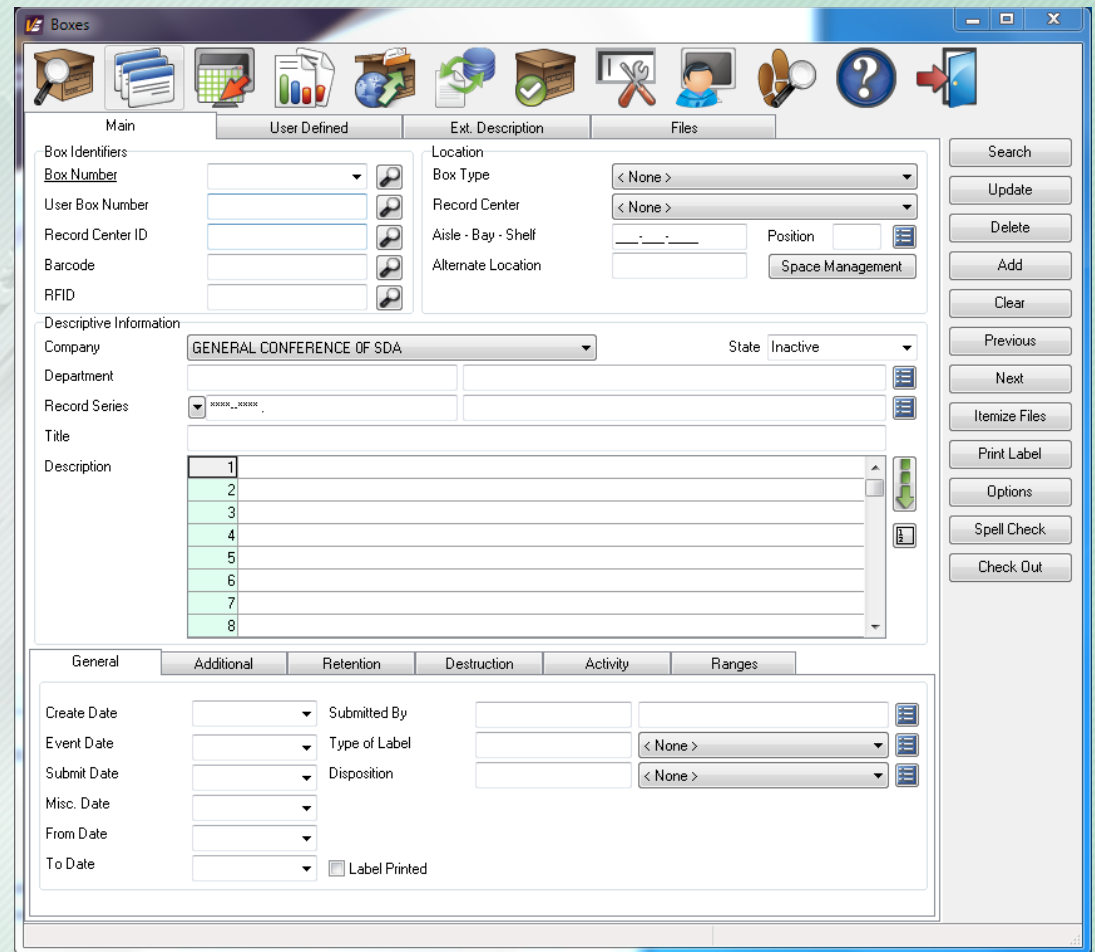


NEW BOX ENTRY

- Box Number (Automatically Generated)
- User Box Number
- Department
- Record Series
- Title
- Description
- Location
- Label Type
- Disposition
- Dates

Versatile Box#	User Box#	
11142	R 16	
PROCESS	BY	DATE
Cleaned		
Scanned		
Verified		
GC: Review & Herald		
		

Sample Box Label



The screenshot shows the 'Boxes' application window with the following fields and options:

- Box Identifiers:**
 - Box Number: [Dropdown]
 - User Box Number: [Text]
 - Record Center ID: [Text]
 - Barcode: [Text]
 - RFID: [Text]
- Location:**
 - Box Type: < None >
 - Record Center: < None >
 - Aisle - Bay - Shelf: [Text] Position: [Text]
 - Alternate Location: [Text] Space Management: [Button]
- Descriptive Information:**
 - Company: GENERAL CONFERENCE OF SDA State: Inactive
 - Department: [Text]
 - Record Series: [Text]
 - Title: [Text]
 - Description: [List with 8 rows]
- General/Additional/Retention/Destruction/Activity/Ranges:**
 - Create Date: [Text] Submitted By: [Text]
 - Event Date: [Text] Type of Label: < None >
 - Submit Date: [Text] Disposition: < None >
 - Misc. Date: [Text]
 - From Date: [Text]
 - To Date: [Text] Label Printed:



FILE/FOLDER ENTRY

- Record Number (Automatically Generated)
- Department
- Title
- Description
- Record Series
- Dates (Event, Creation, etc.)
- Media Type




The screenshot shows a software window titled "Files" with a toolbar at the top. The main area is divided into several sections:

- Descriptive Information:** Includes fields for Record Number, Barcode, Company (set to "GENERAL CONFERENCE OF SDA"), Department, Record ID, Record Series, Title, and a Description table with 11 rows.
- Location Information:** Includes fields for Cabinet, Drawer, Index, and an "Alternate" radio button.
- Box Information:** Includes fields for Box Number, User Box Number, Record Center ID, Box Barcode, Record Center, and Box Location.
- Security Level:** A dropdown menu currently set to "Public".
- General Tab:** Contains date fields (Create Date, Event Date, Submit Date, Misc. Date, From Date, To Date) and dropdown menus for Media Type, Disposition, Submitted By, Type of Label, File Room, and Office Of Record.
- Flags:** A list of checkboxes for "Label Printed", "Vital Record", "Destruction Review", "Option Flag 1", "Option Flag 2", "Annual File", "Official Copy", "Allow Check Out", and "Closed".

On the right side of the window, there is a vertical column of buttons: Search, Update, Delete, Add, Clear, Previous, Next, Print Label, Options, Spell Check, Check Out, and Export.



SAMPLE COVER SHEET

Project Name:	Advisory Minutes		
Folder Name:	Advisory minutes, correspondence 2007-2009		
Department:	/NAG000046/ NA: Multilingual Ministries		
Folder Description:	Advisory minutes, correspondence 2007-2009 Asian Advisory		
Versatile Record ID:	12345	Record ID:	0000030
Versatile Box:	123	Local System ID:	
Versatile User Box:	WH 2743	Folder Number:	0
Document Type/Record Series:	MINS-NONE.		
No file was found in the box:	<input type="checkbox"/>		
Scanned by:	 		
QRCode Data:			

Project Name

Department Name

Description of Content

Record #

Record Series

QR Code



CLEANING

DOCUMENT PREPARATION PROCESS

Bindings removed and files are prepared for scanning

Discard Metal Objects

- Paper Clips, Staples, Pins, etc.

Handle Atypical Paper

- Reposition nonstandard sized paper within the stack to facilitate feeding into scanner

Expose All Content

- Separate content that may obscure useful information on the page it is attached to (e.g. large photographs taped to an application)

Insert Coversheets

- Insert coversheet at beginning of document (Folder)



SCANNING

Files are scanned in Kodak Capture software with coversheet placed at the beginning of each file.

Scan Document

- Ensure all pages are scanned

Verify Scan

- Delete blank pages, rescan misfeeds, rotate pages (if necessary)

Process Scan

- Convert scan to PDF and TIF formats, and move to appropriate destination (automated by scanning software)

Fix Process Errors

- If necessary, correct index errors, remedy network connections, delete previously existing files

Verify Box

- Verify all documents within the active box have successfully processed



SCANNING

Processing creates 4 types of files for each document



Widely Supported
No Compression
Stores a Collection of Images



Text Recognition
Smaller File Size



Document Metadata
Facilitates Verification



File Information



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VERIFICATION

Documents are verified against scans to ensure that all information was accurately captured.

Verify Box

- All Documents (Folders) within a Box have successfully been processed

Verify Metadata

- Metadata is consistent between Records Management Software, Coversheets, Filenames, and SharePoint (if used)

Verify PDFs

- PDF files are in the proper destination(s)

Verify TIFs

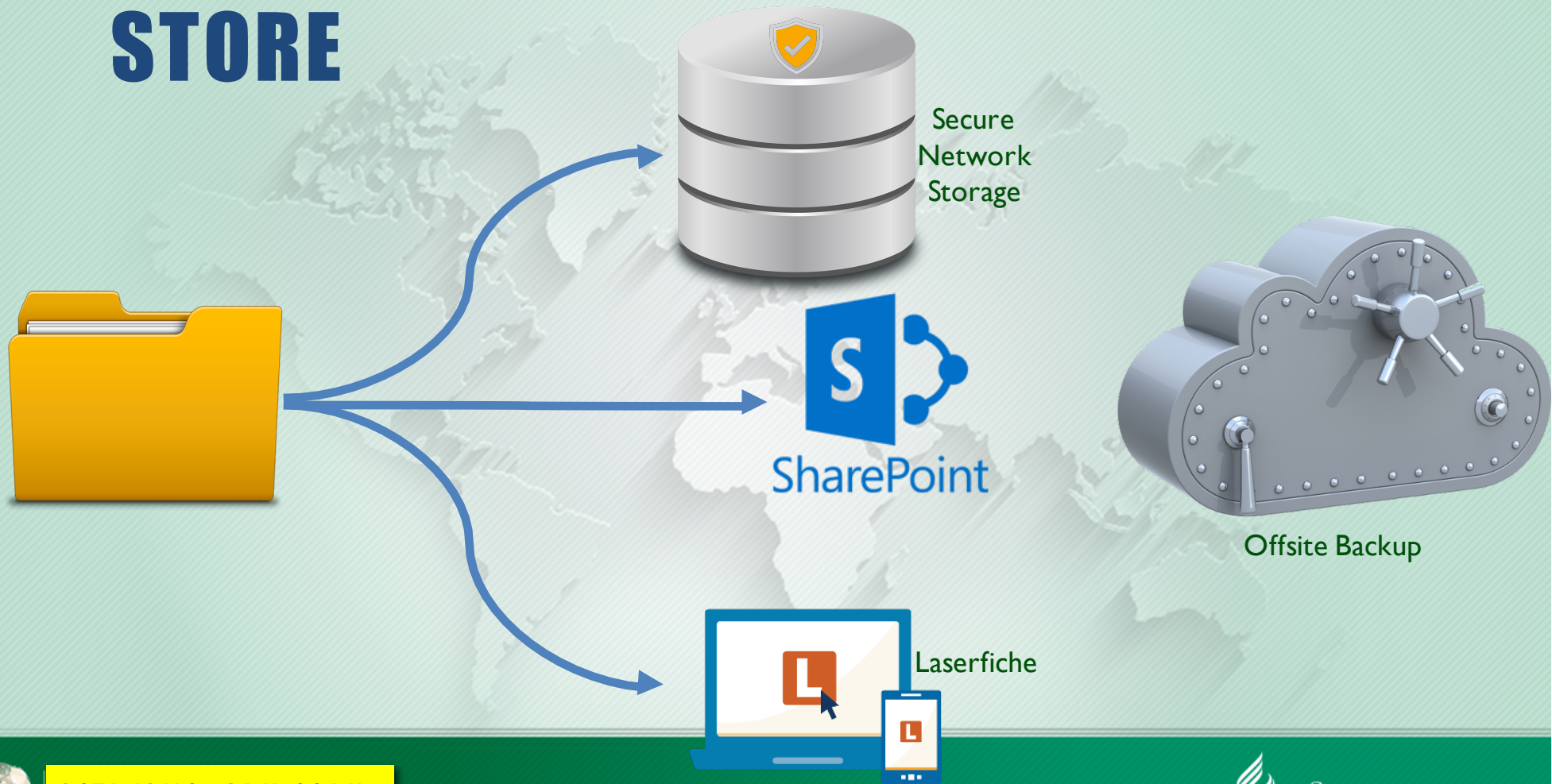
- TIF files are in the proper destination(s)

Verify Complete Project

- Once project is complete, verify that all documents, boxes, PDFs and TIFs are accounted for and appropriately located.



STORE



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INTERESTING FACTS

“Computer users spend 7.5 percent of their time on a PC looking for misplaced files.” (Survey reported in *Information Week*).

“Office workers can waste up to two hours a day looking for misplaced paperwork--at total of 500 hours (62.5 days) per year”

“U.S. managers spend an average of 4 weeks a year searching for or waiting on misfiled, mislabeled, untracked, or ‘lost’ papers” (Cuadra Associates).

Source: <http://www.southwestsolutions.com/interesting-records-management-facts/interesting-records-management-facts>



QUESTIONS



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