**What should my unit do to prepare to implement Document Imaging?**

* Document existing manual, paper-based business processes that you hope to automate using document imaging and workflow.
* Document imaging will permit changes to existing business processes. Consider and outline the expected “future state” for each of these proposed business processes.
* Can you answer the question: what is motivating you to consider document imaging? Have you anticipated ROI, employee productivity, risk reduction, compliance expectation, etc.?
* Identify the quantitative and qualitative benefits you anticipate to realize by moving to document imaging? (ROI, improved service, etc)?
* Assess the human resources available in your office to support a systems implementation and on-going operations. Do you have staff who understand your current business practices? Would you empower this staff to make decisions during the implementation to support this move to document imaging?
* Identify, budget dollars (or anticipated ROI) to support a document imaging implementation and on-going operations?
* Based on peer review and benchmarking, many institutions change their newly developed business process in document imaging after Year 1 as a result of lessons learned from Year 1. One way to try and overcome this issue is to discuss business processes with business units at other institutions (identical or similar) to yours to hear their lessons learned. It may be money well spent to make a site visit to another institution.
* Visit an office on campus that now uses document imaging (e.g., Undergraduate Admissions). Ask them to show you the software and walk through one business process to help your office understand how the product works for that office. This should help you to think creatively about future state of business processes in your office.
* Complete the Enterprise Content Management Readiness Audit for OnBase implementation.

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| **Department or Division: (e.g. Nursing School, Campus Life)** | **Prepared by:** | **Date:** |
|  |  |  |
| **Business Unit (e.g. Admission or Grants):** | **Contact Name:** | **Phone Number / Email:** |
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| *In an effort to support the startup of new projects for Enterprise Content Management (ECM), the following framework has been prepared to guide the department or division to implementation readiness. Completion of this information will inform and be used by the ECM Steering Committee for initial discussion and prioritization. Information may be completed on the form and/or attached as needed.* |

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| 1. **Business Process Information** | | |
| **What anticipated benefits would you hope to accomplish by implementing document imaging?** | |  |
| **List the major business process(es) to be modified.** | |  |
| **Using visual & narrative representation, document the current business process flow.**  (Using shapes in Word, Visio, Word SmartArt, etc.) If you need assistance, contact Business Practice Improvement at bpi@emory.edu | | *Attach flow documents* |
| **Using visual & narrative representation, document future business process flow (if envisioned).** | | *Attach flow documents* |
| **Generate a list of all document types to be scanned and/or stored.** | |  |
| **List all user types (e.g., student, faculty) that will be working with the system** | |  |
| Estimated of anticipated number of users | |  |
| Identify any special requirements that may be required (e.g., systems conversion, required systems integration) | |  |
| **Other:** | | |
| **2. Timeline Information** | | |
| **What months in your business cycle should not be disrupted due to an implementation?** | |  |
| **If there is a firm date of completion, describe the reasons for the constraint and any workarounds if the date isn’t attainable.** | |  |
| **List volume for any archive scanning of old paper records.** | |  |
| **Other timeline information:** | | |
| **3. Resources** | | |
| **Do you have any resources you can dedicate to this project? (both people and money)** | |  |
| **Do you anticipate that you will need to request funding to help with this implementation?** | |  |
| **Other resource information:** | |  |
| **4. Technical Considerations** | | |
| **Describe all the image input sources including specific vendors.**  (e.g. local scanners, Emory Document Services, data imports, , etc.) | |  |
| **List all systems where integration is required** | |  |
| **Describe any document image conversion including volume and image source.** | |  |
| **Other technical considerations:** | | |
| **5. University Benefit and/or Return on Investment Considerations –**  **Realization will be documented after project completion** | | |
| **Who would benefit from this project? (Your department/unit, school, entire university?; students, staff, faculty?)** | |  |
| **Do you anticipate an ROI—in real dollars or that you could re-purpose for tasks that you do not currently have resources to accomplish? Please quantify this as much as you can.**  **Document any hard dollar ROI**  (e.g. supply costs, space reallocation, staff savings, etc.)  List non-quantifiable benefits that you expect to achieve | |  |
| **Describe any risk reduction.** | |  |
| **Describe any compliance or legal/regulatory issue resolution.** | |  |
| **Describe any customer service improvements.**  (e.g. response time on document receipt, customer service time savings, etc.) | |  |
| **Other Benefit/ROI Considerations:** | | |
| **6. Other important information?** | | |
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