Introducing the Document Imaging System

The University is rolling out a new Document Imaging System to the Graduate Admissions Offices at the Boston, Dartmouth, and Lowell campuses in the fall of 2010.

What is the Document Imaging System?
The Document Imaging System provides you with an online repository for all your documents. Plus, it creates an electronic management system for documents, including virtual filing drawers and workflow queues.

Who will receive access to the system?
The following University employees will receive access during the initial rollout to the Graduate Admissions Office:
- Graduate Admissions Office Staff
- Graduate Program Directors, GPD Assistants and Committee Members
- Registrar’s Office Staff

How will I access the system?
You will receive instructions for logging into the system soon after it becomes available.

What type of access will I get?
Access is based on your campus role and responsibilities.

If you review and/or approve Graduate Admissions documentation, such as an application, you will receive access to review and/or approve that documentation within the Document Imaging System.

If you currently file or scan documentation for the Graduate Admissions office, you will receive access to scan and verify the quality of the scanned documentation.

How do I use the system?
You will receive training on how to use the system functionality that will impact your business processes. Please see the “Get in the Know: Learning How to Use the System” article for more details.

What are the benefits of Document Imaging?
1. Saves Space. Reduction of office space footprint currently required to store hard copy paper documents.
2. Saves Time. Automation of document review and approval through online workflow.

Welcome from the Application Steward
By Lori Dembowitz
Application Steward, Document Imaging Director, IT Project Management, UML

Welcome to the Document Imaging (DI) initiative! We are very excited about Document Imaging and the benefits it will bring to UMass.

The goals of Document Imaging are to streamline our administrative operations and drive greater efficiencies into our day-to-day processes.

Document Imaging is an enterprise platform that will enable us to scan documents and tag them with descriptive information (metadata); link documents to PeopleSoft records; capture information from email, fax and web forms; and apply workflow to systematically route documents based on business rules. Going forward, we’ll look to apply and automate document retention policies.

The Document Imaging team is comprised of members from Boston, Dartmouth, Lowell, and the President’s Office. We’ve made a lot of progress over the past 9 months:
- Developed a business case;
- Evaluated and selected an enterprise platform – ImageNow by Perceptive Software;
- Gained subject matter expertise on the application;
- Built-out the infrastructure to support ImageNow;
- Mapped business processes for the Boston, Dartmouth, and Lowell Graduate Admissions offices;
- Partnered with ImageNow consultants on the design of the Graduate Admissions solution.

Document Imaging will be deployed to the Graduate Admissions offices in September 2010. Campus and project governance will help to determine priorities for future department implementations. Thanks to everyone who has been involved in bringing about this enterprise solution at UMass.
The New Document Imaging System
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3. **Saves Paper.** Share a document with multiple people without duplication.

4. **Integrates with Business Applications.** Applies Business Application data to documents within the Document Imaging System. For example, a document evaluator within the Graduate Admissions Office can apply PeopleSoft data such as a student’s ID to an applicant’s transcript within Document Imaging. This linking process ensures that your document values correlate with the data you store in your business applications.

5. **Organizes Documents.** During capturing, document tags are applied to index and structure the documents for easy retrieval.

6. **Secure.** Documents are stored on a secure system and replicated for backup purposes. An application fail-over plan is also in place should any major server or system issues arise.

More details to follow in future communications regarding features and functionality of the Document Imaging System.

Get in the Know:
Learning How to Use the System

The University is currently developing training materials for all users of the Document Imaging System.

- **Graduate Admissions Staff,** including the Graduate Admissions Director, and the Boston Registrar’s Office will receive instructor-led training along with training manuals, job aids, and simulation videos.
- **Graduate Program Directors,** GPD Assistants and Committee Members will receive job aids along with quick online videos and quick reference guides.
- **Document Capturing Staff** will receive on-the-floor training and a quick reference guide on the document capturing process.

As training materials are developed, campuses will have selected users from each of the above groups review and test out these materials. It is our goal to make these training materials as effective as possible for the rollout of the system.

More details around training will be communicated closer to the system implementation date (Fall 2010).

Stay Informed:
Document Imaging Website


Questions and Suggestions
Please feel free to contact Linda Perrotto (linda.perrotto@umb.edu; 617-287-5212) with any questions regarding the Document Imaging System.

We also encourage feedback on all communications and training materials. We’re here to provide the best service necessary for a successful implementation. Help us help you!