How TAB Helped The University of Toronto Image a Collection

Executing a Successful Imaging Project: Real-World Records Management

What are the 3 things you need when imaging your critical records?

Accessibility, security and integrity.

For the Division of University Advancement at the University of Toronto, these were top of mind when they began the search for a digitization vendor.

1.0 A Business-Critical Collection

They needed to convert all of the official hard-copy fundraising records from the previous University Campaign: confidential, business-critical information, 7 years of business and planning documents, budgets, project documents, proposals, communications pieces—in short, ALL documents associated with this groundbreaking campaign.

The University of Toronto worked with TAB because they were the only vendor with a process and a facility that provided the security, data integrity and sound understanding of the vision.

2.0 What To Look For In A Vendor

Ursula Shail, Associate Director, Records, Facilities and Services, knew from past experience what they needed in a vendor. They needed someone who could:

- Digitize these records in a secure environment, providing total transparency throughout the entire process
- Meet the requirements to provide readable documents in colour, and address the issues of artwork, transparencies, and print materials
- Deliver requested records within 24 hours
- Work in a tight time frame (3 weeks)

They went with TAB because, as Shail notes, TAB was the only vendor with a process and facility that provided the security, data integrity, and sound understanding of the vision.

Pricing figured in the selection, too: they had wanted to capture the full project without spending an arm and a leg, and TAB's pricing was accurate and reasonable.

As Shail puts it, "The way TAB laid out process, pricing, and communication from the start showed they understood the project. They did an analysis of a sample file, which gave them a realistic sense of what was involved. We knew we would have access to an online tool so we could see into the process throughout, including scheduled project updates. Plus, their core business function is records management, which shows they understand the complexities of records, not just scanning processes and technologies. For all these reasons, TAB won the business. We had confidence in them."

3.0 The Process

TAB has extensive experience moving and imaging files, and over time we have developed a process that ensures project success.

3.1 Inventory

As a best practice, TAB won't take any content off-site unless we know exactly what is in the collection. So this project started off with the team importing the University of Toronto's existing file list into TAB FusionRMS. We then created, from the existing files, pre-printed separator sheets with a file name and bar code and scanned it into the FusionRMS system. So in essence we did an inventory of the files before they even left the premises, which allowed us to identify any exceptions.

3.2 Moving To TAB Site

Once the inventory was complete, the files were moved to our secure imaging site. All the files were imaged over a period of 3 weeks. As files were scanned, the existing naming convention of the filing system was applied to the metadata then uploaded to the FusionRMS system, which provided online access of the content for the university.

3.3 Transparency And Communication

At the end of every day, TAB provided the University of Toronto with an FTP and FusionRMS upload of the completed files so that they knew what they had and where it was and could then put that information into their system.

All scanned images were also uploaded into FusionRMS in real time and the University of Toronto could track this through the web portal.

This meant that at any time, the University of Toronto had real-time visibility of the project at the file level.

TAB's process and technology also allowed any authorized person from the University of Toronto to escalate the standard retrieval protocol (24 Hours) and we could pull a file, scan it and send it in 90 minutes.

4.0 Positive Outcomes

Not only did TAB complete the project on time and on budget, scanning every record in the collection in 3 weeks but because of the imaging process, they produced a better inventory list than the University of Toronto had previously.

TAB also provided the University of Toronto with a SharePoint®-ready solution. As Shail says, "they did it without us having to ask, and we didn't really know how much we needed it. As we've started to move to a SharePoint environment, TAB provided us with this digital collection, along with metadata, properties and structured inventory in a 'plug and play' format, and our IT director was ecstatic."

When the project was done, TAB stored the physical copies at a secure location for six months before they were to be destroyed, returning the files that were required for archives.

5.0 The Right Imaging Experience

As Shail and her department did not have as positive an experience with another vendor on a previous project, they were relieved that the TAB project had gone so smoothly, finishing on time and on budget.

What made it a great experience for Shail and her team was the communication. As she puts it, "During the process, issues were identified on the spot, and we worked together to find solutions. Because, let's face it, a lot of things come up in scanning hard copy, and this was much better than getting a report at the end of the week from the vendor and them saying, 'here, look into this list of issues'. Working with TAB on this project was a great experience and this process has set the bar for future digitization projects."

If you'd like to find out more about this project, or talk to TAB about how we can help with your imaging project, please contact us.

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