



**Wharton County  
Junior College**

**Proposed Agenda Item  
Board of Trustees Meeting**

Complete this form and submit it to the Office of the President by 5:00 pm on the eleventh day before the following Tuesday meeting of the Board of Trustees. If this form does not provide enough space, you may use an expanded version *as long as you follow the format specified below.*

Date of Board Meeting: May 15, 2018 Date of This Proposal: May 4, 2018

**SUBJECT:**

Approve the transfer of **\$18,088.00** from the Plant Fund to pay for part-time staff and over time for current staff to convert WCJC's student records from 1946 to 1982 into electronic format.

**RECOMMENDATION:**



Approve the transfer of **\$18,088.00** from the Plant Fund to pay for part-time staff and over time for current staff to convert WCJC's student records from 1946 to 1982 into electronic format.

**BACKGROUND/RATIONALE:** WCJC's student records from 1946 to 1982 are maintained in filing cabinets in a paper format. These records require a very large amount of space to store. These records are difficult to access since the filing cabinets must be manually accessed. Finally, the long term safety of these records must be ensured. By converting these records into electronic files, a large amount of space is saved, access the files becomes significantly more simple and the long term viability of the records is maintained. The project plan is attached to this item. Outside vendor bids for this conversion were in excess of \$38,000.00.

**Estimated Cost and Budgetary Support:** \$18,088.00 Transfer from the Plant Fund.

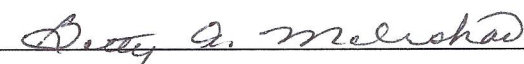
**RESOURCE PERSON(S) [name(s) and title(s)]:**

**SIGNATURES:**

  
\_\_\_\_\_  
Originator  
  
\_\_\_\_\_  
Cabinet-Level Supervisor

5/4/18  
\_\_\_\_\_  
Date  
5/4/18  
\_\_\_\_\_  
Date

**PRESIDENT'S APPROVAL:**

  
\_\_\_\_\_

5-4-18  
\_\_\_\_\_



## Plan for

### Student Records from 1946-1982

Date of Submission: October 23, 2017/April 2018

Submitted by: Dave Leenhouts

Date reviewed by VP Team:

Recommendation of VP Team:

*DR Luc PGGK*

*TBDK FUNDS NEEDED!*

Date of submission to President: 4-27-18

Action by President:

*Billy G. Melnick Approve*  
4-27-18

*Bygo please allocate funds*

Approval/Disapproval/Revision Needed/Other

## I. Background / Summary of Project

### A. Statement of the Problem

Student records (transcripts) from 1946 through 1982 are being maintained in a paper file format. These records present a challenge to store in an environment that is safe, and will protect them from the effects of aging. These records must also be accessible to the staff in the Office of Admission and Registration (OAR) in a format that is easily accessible when requests for these records are received.

Converting these records into an electronic format is a highly desirable option. The records would be safe, immune to the effects of aging and easily accessible to the OAR staff.

The option of using an outside vendor to convert the records into an electronic format was deemed to be cost prohibitive (Executive Cabinet Minutes 1-19-17). The direction was given to create a plan to convert the student records into an electronic format using college resources, part-time staff and current staff working over-time hours.

### B. Overview of Anticipated Solution

Converting the student records from 1946-1982 will be completed by part-time staff and current OAR staff. Additional funds will be needed for the part-time staff person as well as overtime hours for the OAR staff. Conversion of all student records from 1946-1982 will be completed within 18 months of the project kick-off.

### C. Cost of Implementation

<b>Personnel Costs</b>	<b>Cost</b>
<b>Staff Costs FY 18</b>	
Part-time Clerk* working 19 hours per week for 29 weeks at 11.91 per hour (FY 18)	\$6,562.00
Current Staff **working overtime hours for FY 18	\$3,500.00
<b>Total Costs for FY 18</b>	<b>\$10,062.00</b>
<b>Staff Costs for FY 19</b>	
Part-time Clerk working 19 hours per week for 20 weeks at 11.91 hour (FY19)	\$4,526.00
Current Staff working overtime hours for FY 19	\$3,500.00
<b>Total Costs for FY 19</b>	<b>\$8,026.00</b>
<b>Total Cost for the project completion</b>	<b>\$18,088.00</b>
<i>*Clerk paid at the rate of seasonal, part-time clerks for OAR and campus support (job description approved and on file with HR)</i>	
<i>**Current Assistant Admission Officers make 19.74 per hour on over time. This will allow for 177 overtime</i>	



<i>hours each FY to complete the project.</i>	
<b>Funds to be moved from Plant Fund</b>	

## II. Plan for Implementation

### A. Identify Stakeholders

The following employees and/or the staff they supervise have been identified as key participants in the implementation of the conversion of student records from 1946-1982.

- Director of Admissions and Registration will lead OAR staff
- Student Services Specialist--Admissions will supervise Admission Document Specialist, Part-Time Clerical and OAR staff working overtime hours
- Admissions Document Specialist develops procedure, in cooperation with Student Service Specialist for Admission, for processing student records into electronic format and audits the conversion process
- IT staff complete electronic "filing cabinet" for student records (1946-82) and set access for processing with OAR staff
- VPT (provides guidance and oversees IT staff)
- Director of Facilities Management (responsible for staff moving existing records to accessible location for OAR staff)
- VPSS (provides guidance and oversees OAR staff)

### B. Explain Project Deliverables

1. Student Records from 1946-1982 converted into electronic format
2. After auditing of electronic records is completed existing "paper records" will be destroyed in accordance with best practices
3. Students Records from 1946-1982 will be maintained in safe electronic environment and be easily accessible to OAR staff

### C. Develop a Timetable

Timeline is an estimated guide

- Project Submitted and Approved : April 2018
- Part-time clerical staff begins work on scanning and indexing student records from 1946-1982: April 2018
- OAR staff begins work, in the overtime environment, on scanning and indexing student records from 1946-1982: April/May 2018
- Project Completed, student records from 1946-1982 converted: April 2019

### D. Business Plan for Flow of OAR Documents

- See Attached documents for OAR Processes

---

### **E. Criteria for Success**

- Process for conversion of student records from 1946-1982 begins in April 2018
- Audit of converted student records indicates 100% accuracy and compliance with process (audit at 1 month after kick off and then every month after that to ensure accuracy)
- Student records from 1946-1982 are 100% converted to electronic format, audit at 100% accuracy, paper records are destroyed.

# Transcripts from FALL 1946 - SUMMER 1982

WCJC-S-ARCHIVE-TRANS (CABINET NAME)

## IMPORTANT:

Always use any information the transcript has. Shortcuts will only result in an expensive, and time consuming clean up.

## PHASE 1: PREPPING

### **Remove:**

Staples, Paper Clips, Sticky Notes, or any other foreign object(s) that may cause scanner to jam.

### **Sort:**

We only need to scan/index the students' academic transcript. Any additional information that may be filed with the transcript does not need to be saved. (example: financial aid or business office records for the student.) This information can be shredded if retention period has been satisfied.

## PHASE 2: SCANNING

Step 1 Open up BDM Prod → Log In

Step 2 Right Click on B-S-ADMIN

Step 3 Click on Batch Import

Step 4 "Name Your Work" → Next

Step 5 Select/Check your Scanner → OK

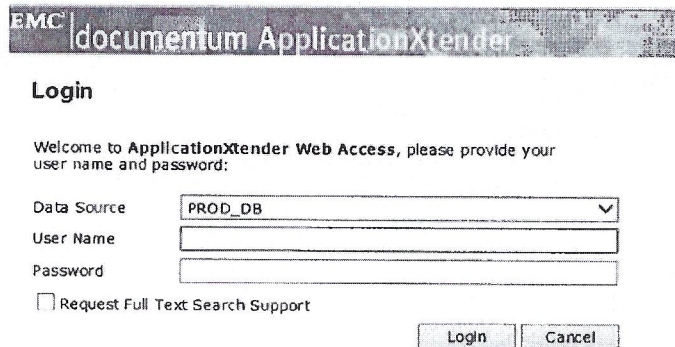
Step 6 Click on drop down arrow again → Driver Configuration

Step 7 Select "BW" for Black and White Documents → OK

\*Load documents

Step 8 Click on "Scanning button". (Watch Each Page being scanned to avoid missing pages, unreadable pages, mixed pages ect.)

Step 1) Open BDM Prod → Log In



EMC documentum ApplicationXtender

**Login**

Welcome to **ApplicationXtender Web Access**, please provide your user name and password:

Data Source:

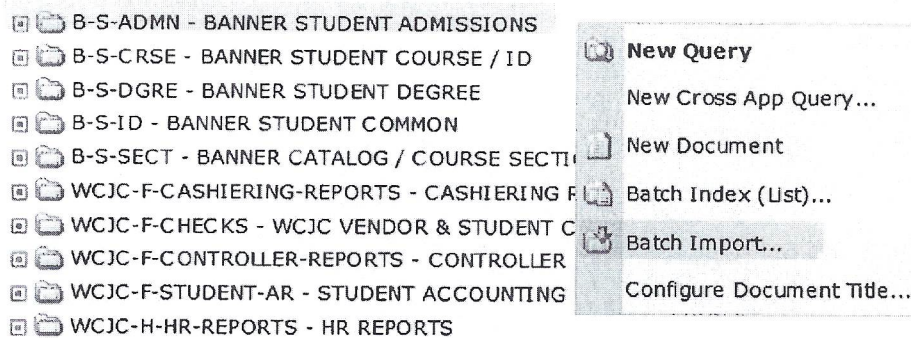
User Name:

Password:

Request Full Text Search Support

Step 2) B-S-ADMIN → Right Click

Step 3) Batch Import → Select



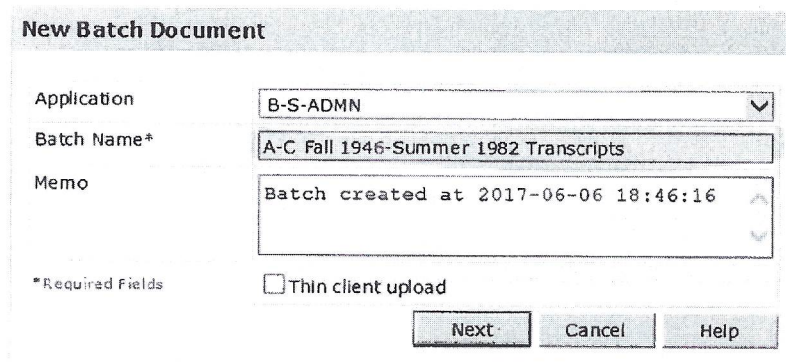
File Explorer view showing a list of folders:

- B-S-ADMN - BANNER STUDENT ADMISSIONS
- B-S-CRSE - BANNER STUDENT COURSE / ID
- B-S-DGRE - BANNER STUDENT DEGREE
- B-S-ID - BANNER STUDENT COMMON
- B-S-SECT - BANNER CATALOG / COURSE SECTI
- WCJC-F-CASHIERING-REPORTS - CASHIERING R
- WCJC-F-CHECKS - WCJC VENDOR & STUDENT C
- WCJC-F-CONTROLLER-REPORTS - CONTROLLER
- WCJC-F-STUDENT-AR - STUDENT ACCOUNTING
- WCJC-H-HR-REPORTS - HR REPORTS

Right-click context menu options:

- New Query
- New Cross App Query...
- New Document
- Batch Index (List)...
- Batch Import...
- Configure Document Title...

Step 4) Name your Work.



**New Batch Document**

Application:

Batch Name\*:

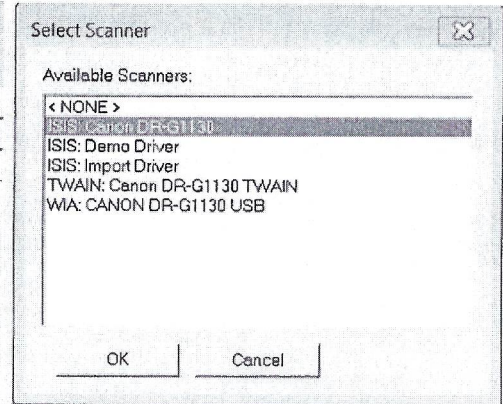
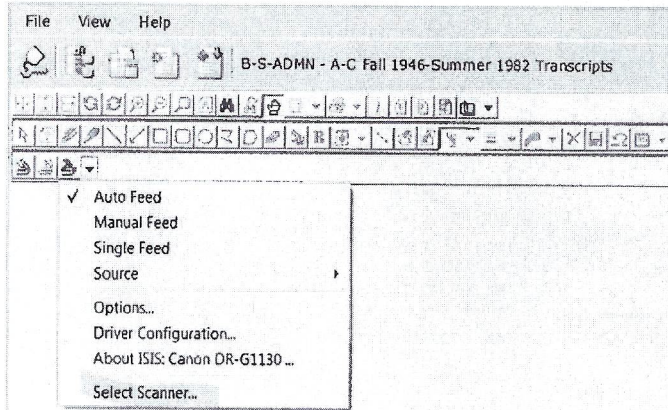
Memo:

\*Required Fields  Thin client upload



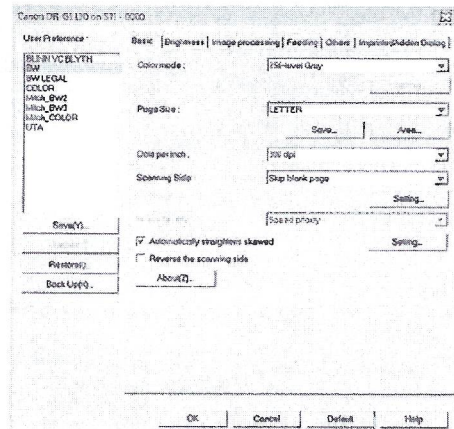
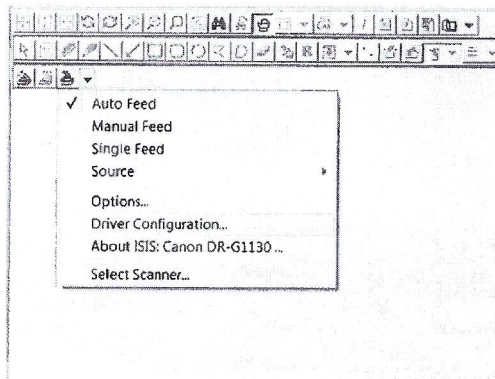
Step 5) Drop down arrow → Select Scanner

\*Select the scanner you are using.

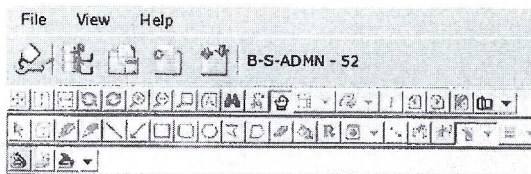


Step 6) Drop down arrow → Driver Configuration

Step 7) Select BW setting → OK



Step 8) Click on Scanning Button.





Step 4 Fill as much information as you have

Step 5 Click submit

Step 6 Results based off of the information provided will appear

Step 7 Double click on the document to view and/or print if needed

Backups:

All Backups are done by WCJC's IT department.

## Notes:

There will be no delete option as this is very important information we are scanning and indexing and do not want to risk losing any of it.

Administrators: Amanda Jurek & Mary Ann Glaze

Indexers: Amanda Jurek, Mary Ann Glaze, Lindsey Reeves, Carrie Lopez

Viewers: Dave Leenhouts, Karen Preisler, Emily Voulgaris, Mary Ann Glaze, Amanda Jurek, Ramonica Cortez, Marla Martinez, Angela Manna, Carrie Lopez, Lindsey Reeves, Amanda Schulze, Rose Flores

### PHASE 3: INDEXING

This will be the fields of indexing.

Index Name	Field Value
ID	<input type="text"/>
PIDM	<input type="text"/>
DOCUMENT TYPE	<input type="text" value="v"/>
LAST NAME	<input type="text"/>
FIRST NAME	<input type="text"/>
SSN	<input type="text"/>
BIRTH DATE	<input type="text"/>
TERM CODE	<input type="text" value="v"/>
APPLICATION NUMBER	<input type="text"/>
ADMISSIONS REQUIREMENT	<input type="text" value="v"/>
INSTITUTION NUMBER	<input type="text"/>
ROUTING STATUS	<input type="text" value="v"/>
ACTIVITY DATE	2017-06-06 15:39:20
RECEIVED DATE	<input type="text"/>
COMMENTS	<input type="text"/>
INDEXER	<input type="text"/>
VPDI_CODE	<input type="text"/>

- 1) SSN ----123456789
- 2) Student ID---@00000000
- 3) Birth Date---09-21-1967
- 4) Last Name ---- MUNOZ
- 5) First Name---- ROBERT
- 6) Middle Name----LEE
- 7) Alternate Name- ROB,BERTO
- 8) Graduation Date--05-27-1948
- 9) Activity Date-Pre filled
- 10) Comments-- If needed
- 11) Indexer- AJUREK

### PHASE 4: Retention/Auditing

-All documents will be held for 3 months and then will be shredded.

-Auditing will occur each Friday, auditing approximately 20% of the weeks indexing.

### PHASE 5: Retrieving Information/Back-Ups

To Retrieve Documents:

Step 1 Open up BDM Prod → Log In

Step 2 Right Click on WCJC-S-ARCHIVE-TRANS-LEGACY TRANSCRIPTS-FALL 1946-SUMMER 1982

Step 3 Click on New Query