

Records Retention to Help Your Office

Enhancing Efficiency and Security
Through Electronic Records
Management



www.scview.com

The Importance of Records Retention

- Overview of why records retention is crucial for businesses
- Benefits of maintaining organized and accessible records



Why Store Records Electronically?

- Easier access to important documents
- Enhanced security and protection against data breaches
- Improved efficiency and reduced physical storage needs

The screenshot displays a web application interface. On the left, there is a sidebar with a search filter and a table of records. The main area on the right shows a detailed 'PURCHASE ORDER' for the SCSS School District. The purchase order includes a date of 10/16/2023, a purchase order number of 23227, and a page number of 001. It lists the vendor as SAMPLEVILLE BUS GARAGE and includes a table of items with quantities, units, descriptions, unit prices, and amounts.

| PO No | Check No | Invoice No | PO Date | Vendor |
|----------|-------------|------------|---------|---------------------|
| 230548 | 55687788... | 6772871... | | Test Hardware... |
| 45097 | 12345714 | 0909121 | | South Elementary |
| 45116 | 12345743 | 123... | | OfficeMax... |
| 45140 | 98989905... | y15879... | | South Elementary... |
| 4543051 | 98989907 | REFUND # | | Testing Check Vendo |
| 4547885 | 019719 | 2592 | | SAMPLEVILLE GROCI |
| 4547995 | 015718 | 2457 | | SAMPLEVILLE GROCI |
| 4547991 | 015717... | 1234... | | SAMPLEVILLE GROCI |
| 77777 | 98989906 | REFUND # | | South Elementary |
| 777777 | 98989903 | REFUND # | | Testing Check Vendo |
| 8450115 | 12345742 | 38780834 | | Mary Mars |
| 91399523 | 22000001... | 9062023... | | Krystal Eckhardt... |
| 9890016 | 98989905... | 0662023... | | South Elementary... |
| 9900033 | 98989904 | 0000452 | | South Elementary |

PURCHASE ORDER

Date: 10/16/2023
Purchase Order No.: 23227
Page: 001

Send All Invoices To: Board of Education
SCSS School District
600 Industrial Parkway
Norwalk, OH 44857
(567) 424-6054 FAX (888) 373-0523

THIS PURCHASE ORDER NUMBER MUST APPEAR ON ALL LETTERS, INVOICES, SHIPPING MENOS, PREPAID SHIP BILLS WITH CARRIER.

NO SHIPMENTS ACCEPTED AFTER 4:00 P.M.

SAMPLEVILLE BUS GARAGE
1140 SYCAMORE LANE
SAMPLEVILLE, OH 55555

ATTN: cripco
TERMS: REQUESTION NO. 40

DO NOT INCREASE AMOUNTS SHOWN WITHOUT PRIOR AUTHORIZATION.

| QUANTITY | UNIT | DESCRIPTION | UNIT PRICE | AMOUNT |
|----------|------|-------------|------------|--------|
| 2.0010 | ea | Cool things | 47.8990 | 94.85 |



Leveraging Electronic Documents and Workflows

- Streamlining daily processes with digital workflows
- Enhancing document security and accessibility
- Reducing human error and improving compliance



AP Workbench Search Notifications Workflow Tools Admin Log Out 10/30/2016 MCOSS SCAMM

Document Type (all) Report Expanded Contract All Close 3 opened documents

Invoice Added (2)

- Invoice Approved (1)**
- Invoice Deleted (1)**
- Ready to Pay/Print (4)**
- Then & Now (2)**
- Invoices - Explain Them & Now (1)**
- Submitted (1)**
- Completed (4)**
- Failed (2)**

Amazon - WFS (1)

Capital One - WFS (2)

- Chevy - WFS
- Walmart - WFS

Activities

- Auction workflow
- Budget and Purpose Statement
- Hiring
- JPOF Prior Approval
- Job Vacancy Management Approval
- Leave Requests
- Maintenance Work Order
- Message
- Outstanding
- PJO Reevaluation
- Public Records Requests
- Receipts
- Referrals
- Requisitions

HS Security (3)

Items to Review

| # | Date Type | Invoice No. | PO # | PO Date | Invoice Date | Vendor | Action Note | PO Amount | Invoice Amount |
|---|------------------|-------------|-------|------------|--------------|--|-------------|-----------|----------------|
| ✓ | Financial Packet | 468425 | 23003 | 06/27/2012 | 07/04/2012 | SC Strategic Solutions Submitted to USAS | | \$91.00 | \$1.00 |
| ✓ | Financial Packet | 3870834 | 23002 | 06/27/2012 | 07/29/2012 | SC Strategic Solutions Submitted to USAS | | \$115.00 | \$236.00 |
| ✓ | Financial Packet | 38708343 | 23002 | 06/27/2012 | 07/29/2012 | SC Strategic Solutions Submitted to USAS | | \$115.00 | \$235.00 |

History

| Date/Time | User | Description |
|------------------------|---------------|--|
| 02/16/2016 03:13:13 PM | adrian@scs | Action: Approve (CDE) was applied using the rule "Default (S16)" moving the item from "Invoice Added (1416)" to "Invoice Approved". |
| 02/16/2016 03:12:25 PM | adrian@scs | Document was added to workflow AP Workflow in queue "Invoice". |
| 02/16/2016 03:06:36 PM | adrian@scs | Document was removed from workflow Action: Remove from Workflow (CDE) was applied using the rule "Default (S66)". |
| 05/05/2012 02:19:38 PM | mjc@csinc.com | Invoice was submitted to USAS (S16) successfully. The item "Submitted (S44)" moving the item from "Submitted (S44)" to "Completed". |
| 03/05/2012 02:19:39 PM | mjc@csinc.com | Invoice was submitted to USAS (S16). |
| 03/05/2012 02:19:19 PM | adrian@scs | Action: Submit to USAS (CDE) was applied using the rule "Default (S16)" moving the item from "Ready to Pay/Print (17)" to "Submitted to USAS". |
| 03/05/2012 02:19:19 PM | adrian@scs | Submitted to USAS. |
| 03/05/2012 02:19:19 PM | adrian@scs | Linked Invoice ID (V) by changing Requestor from "USPS/CMS/CSO" to "USAS". |

Ready to Pay/Print **Remove From Workflow** **Expand Contract Notification** **Then, There & Now**

The Impact of Scanning Paper Documents

- Converting paper documents to digital format
- Reducing the need for physical storage space
- Making remote access to records secure and easy
- Disaster Recovery Mechanism



Moving Forward with Electronic Records

- Recap of key benefits
- Call to action: Implement or improve electronic records retention policies



Want to learn more?

Have questions?

Contact Information:

Troy Stein

Professional Services Manager

SC Strategic Solutions

Phone: 567-424-6054 ext. 107

E-mail: tstein@scview.com

Website: www.scview.com

