

# Records Retention to Help Your Office

Enhancing Efficiency and Security  
Through Electronic Records  
Management



[www.scview.com](http://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 table has columns for PO No, Check No, Invoice No, PO Date, and Vendor. The main content area on the right shows a detailed view of a purchase order for 'SAMPLEVILLE BUS GARAGE'.

**Search Filter:**

Department: Board of Education  
Document Type: Financial Packet  
PO No:   
Check No:   
Invoice No:   
Vendor:   
OCR Search:   
Page Filter:   
Clear Edit Search

**Table of Records:**

PO No	Check No	Invoice No	PO Date	Vendor
230546	55607788...	6772671...		Test Hardware...
45097	12345714	0009121		South Elementary
45116	12345743	123...		*OfficeMat...
45140	98989905...	y5870...		South Elementary...
4543051	98989907	REFUND #		Testing Check Vendo
4507855	015719	2592		SAMPLEVILLE GROCC
4507895	015718	2437		SAMPLEVILLE GROCC
4507901	015717...	1234...		SAMPLEVILLE GROCC
77777	98989906	REFUND #		South Elementary...
777777	98989903	REFUND #		Testing Check Vendo
8450115	12345742	38780834		Mary Mars
91399523	22000001...	9062033...		Krystal Eckhardt...
98980016	98989905...	0662033...		South Elementary...
98980033	98989904	0000452		South Elementary

**PURCHASE ORDER Details:**

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

**PURCHASE ORDER**

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

THE PURCHASE ORDER NUMBER MUST APPEAR ON ALL LETTERS, INVOICES, SHIPPING MEMOS, BILLS OF LADING, EXPRESS RECEIPTS AND PACKAGES. ALL SHIPPING CHARGES MUST BE PREPAID. SHIP BEHIND CARRIER.

NO SHIPMENTS ACCEPTED AFTER 4:00 P.M.

**ITEMS:**

ITEM	DESCRIPTION
S	SAMPLEVILLE BUS GARAGE
I	1140 SYCAMORE LANE
P	SAMPLEVILLE, OH 45555

ATTN: shipper  
TERMS:   
REQUISITION NO. 40

DO NOT INCREASE AMOUNTS SHOWN WITHOUT PRIOR AUTHORIZATION.

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	AMOUNT
2.0010	ea	Cool things	47.0000	94.05



# Leveraging Electronic Documents and Workflows

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

The screenshot displays the Strategic Solutions workflow management system. The interface includes a top navigation bar with options like Home, Search, Notifications, Workflow, Tools, Admin, Log Out, and SCSSDEM023. A left sidebar shows a navigation menu with categories such as AP Workflow, Invoice Added (2), Invoice Denied (1), Ready to Pay/Print (4), Then & Now (2), Invoices - Explain Then & Now (1), Submit to USAS, Completed (4), Failed (2), Amazon - HFS (1), Capital One - HFS (2), Chase - HFS, Walmart - HFS, and various other workflow types like Auditor Workflow, Budget and Purpose Statement, Hiring, IPDP Plan Approval, IPDP Work Assignment Approval, Leave Requests, Maintenance Work Order, Mileage, Onboarding, PO Renewal, Public Records Requests, Receipts, Refunds, and Requisitions. The main content area is divided into two panes. The left pane, titled 'Items to Review', shows a table of financial packets with columns for Doc Type, Invoice No., PO No., PO Date, Invoice Date, Vendor, Action Note, PO Amount, and Invoice Amount. The right pane, titled 'History', shows a list of actions taken on the selected document, including 'Action Approve (29) was applied using the rule Default (28) moving the item from Invoice Added (146) to Invoice Approved', 'Document was added to workflow AP Workflow in queue Invoice Added', 'Document was removed from workflow Action Remove from Workflow (43) was applied using the rule Default (44)', 'Action Successfully Submitted (47) was applied using the rule Default (44) moving the item from Submit to USAS (19) to Completed', 'Invoice was submitted to USAS', 'Action Submit to USAS (98) was applied using the rule Default (47) moving the item from Ready to Pay/Print (17) to Submit to USAS', 'Submitted to USAS', and 'Edited Invoice ID 9 by changing Requestor from staff@scsolutions.com to Requestor from user from 10'. The rightmost pane displays a scanned invoice from TRANS, dated 08/27/2022, for \$128.00, with a total amount of \$288.00.



# 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?**

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