Paperless Party

Red Tape Reduction Initiatives

DENVER PEAK

Paperless Party

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Welcoming Ritual

KZL

At your table share the following:

- Name and pronouns
- Department
- One digital process you have been the end user of that you found to be easy, quick and helpful

  -and/or-
- A paper process you hope to digitize or eliminate

Subject Matter Experts

Tyler Zimmerer

TS Records Manager

Ask about: How long you keep your records and where to store

Walter Van Lue

TS Senior Sharepoint Administrator

Ask about: All things Sharepoint

Melissa Taylor

TS Senior Application Developer

Ask about: Alternative Data Platforms and digitization processes

Evan Pfaff

TS Digital Transformation Engineer

Ask about: How to automate your digital processes

Sarah Stanek

TS Senior IT Web Administrator

Ask about: How to ensure your platforms are accessible

Agenda

- 10:15am - 11:00am Digitization 101
- 11:00am - 12:00pm Innovation Incubation

  Get support for your idea from our experts and mentors!

Digitization 101

Before you move to paperless, consider the following:

- Do you actually need this document? If it is rarely used, consider JUST STOPPING IT!
- Records Retention Policies
- Types of Storage Platforms
- File and Naming Conventions
- Types of Form Platforms
- Automation Opportunities
- Accessibility

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Digitization 101 - Records Retention

What is the difference between a Record and a System of Record?

All documents and information, regardless of physical form or characteristic and regardless of whether public access to them is open or restricted under the laws of the State of Colorado, created or received by the City and County of Denver. This includes “Records” as defined by CORA (Colorado Open Records Act) but is not limited to the statutory definition.

System of Record – is the sole source of storage (regardless of physical or digital format) that houses the authoritative, unaltered, final version of the official record. Any other version of the record outside of the system of record is defined as a copy or a duplicate. Duplicates or copies of records are not official records and are only retained until the task the records was needed for is completed. Then the duplicate or copy of the record is destroyed.

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Digitization 101 - Records Retention

Records retention is defined as timeframe that CCD must hold onto records to meet various internal and external policies, regulations, and other various obligations.

The records retention timeframe is classified by the content of the records you have such as Accounts Receivable, Meeting Recordings, or Emails. All records have a unique records retention timeframe that is defined by the records content.

The City and County of Denver utilize a maximum hold records retention methodology. Meaning that we have an obligation to destroy the record when it has met is retention (holding) period. Unless the record is subject to a litigation hold.

The full General Records Retention Schedule (GRRS) are public facing documents that can be found on Denvergov.org via the link above.

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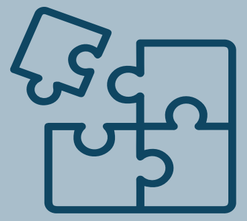
Digitization 101 - Records Retention

Retention Policies

- Look at the general records retention schedule
- Is your data or record a copy or partial copy from the system of record or the official system of record? The original copy subject to retention policies, a copy is not.



Strategy Development

- Create an automated retention schedule for deletion once in the digital space
- Engage CCD Records Manager (Tyler Zimmerer)

Scan and Shred Plan

Once you have scanned physical documents into the digital space, it is best to shred those documents after to avoid further storage and privacy risks.

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Digitization 101- Storage

One Drive

- Access documents anywhere at anytime on any device.
- Direct report documentation such as PEPR's, PIP's, supervision notes.
- Personal work documents such as mileage, resume, cover letter.
- Personal work product that will not be shared
  (if sharing or collaborating store in SharePoint or Teams).
- Drafts – that will not be shared.

Sharepoint (the back end of Teams)

- Access documents anywhere at anytime on any device.
- Public facing documents
- Documents for common use within the division or agency (operational procedures, policies, etc.)
- Documents posted to the HUB or hosted for public consumption (should never contain PII and/or PHI or this information should be redacted)

Teams

- Access documents anywhere at anytime on any device.
- Collaborative documents such as tracking logs or spreadsheets.
- Documents on a retention schedule.
- Documents utilized by multiple persons/agencies.
- Meeting notes or meeting recordings.
- Individual Chats, or group conversations that are to be retained.
- Long-term file storage

Digital storage still costs the city money, so be sure to only be storing necessary files!

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Digitization 101 - File Structure and File Naming Best Practices

File Structure Best Practices

• **Logical Hierarchy**: Organize files into a clear, hierarchical folder structure that reflects your workflow, such as by department, project, or document type. Limit subfolder levels to avoid complexity.

• **Separation of Versions**: Distinguish between drafts and final versions by placing them in separate folders.

• **Archiving and Cleanup:** Regularly archive outdated files and delete unnecessary ones to maintain an organized system and free up storage space.

File Naming Best Practices

• **Consistency and Clarity:** Use a consistent naming convention that includes essential elements like date (YYYY-MM-DD), project name, and version number. This aids in sorting and identifying files quickly.

• **Avoid Special Characters and Spaces:** Instead, use underscores (_) or hyphens (-) to separate words, ensuring compatibility across different systems.

• **Descriptive Yet Concise:** Keep filenames informative but concise, ideally under 25 characters on all folder levels.

Digitization 101- Requirements and Signatures

Paper Requirements

- Are there any policies requiring physical copies or signatures your process? If so, look into revising.
- Who is the custodian or administrator?
- Do online forms have to be identical to the original physical form?

Digital signatures

- What type of signature do you need? Electronic type signature, or timestamped signature?
- Do you need signatures from outside clients or vendors?

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Digitization 101- Form Platform Options

System	License	Internal/External	Best Use	Process features
Adobe	• Need a license; cost to the agency	• Internal and External	• Best use for fillable forms and timestamped signatures	• No automated process flows
Nintex/ Sharepoint	• Need a license; free to agencies	• Internal	• Best used for internal use to capture info from city employees (mobile app included at no cost) • Field calculations • Complex workflows (approvals and notifications) • Show/hide fields based on computed or selected values	• Seamless with Sharepoint • Can go to an inbox • SharePoint list connects directly with PowerBI
MS Forms	• No license needed	• Internal and External	• Best for Filling out information • NOT used for signatures	• Goes to Excel spreadsheet
OpenForms	• Enterprise license; free to agencies	• Best for External	• Best for Filling out information	• Seamless with Sharepoint • Can go to an inbox • Export to Excel spreadsheet

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Digitization 101- Automation

What makes a good candidate for Automation?

An entire process or single steps in process that:

- Are highly manual and repetitive
- Are conducted at a high frequency and/or in large volume
- Follow a standard path and have minimal exceptions

Automation Delivery Process

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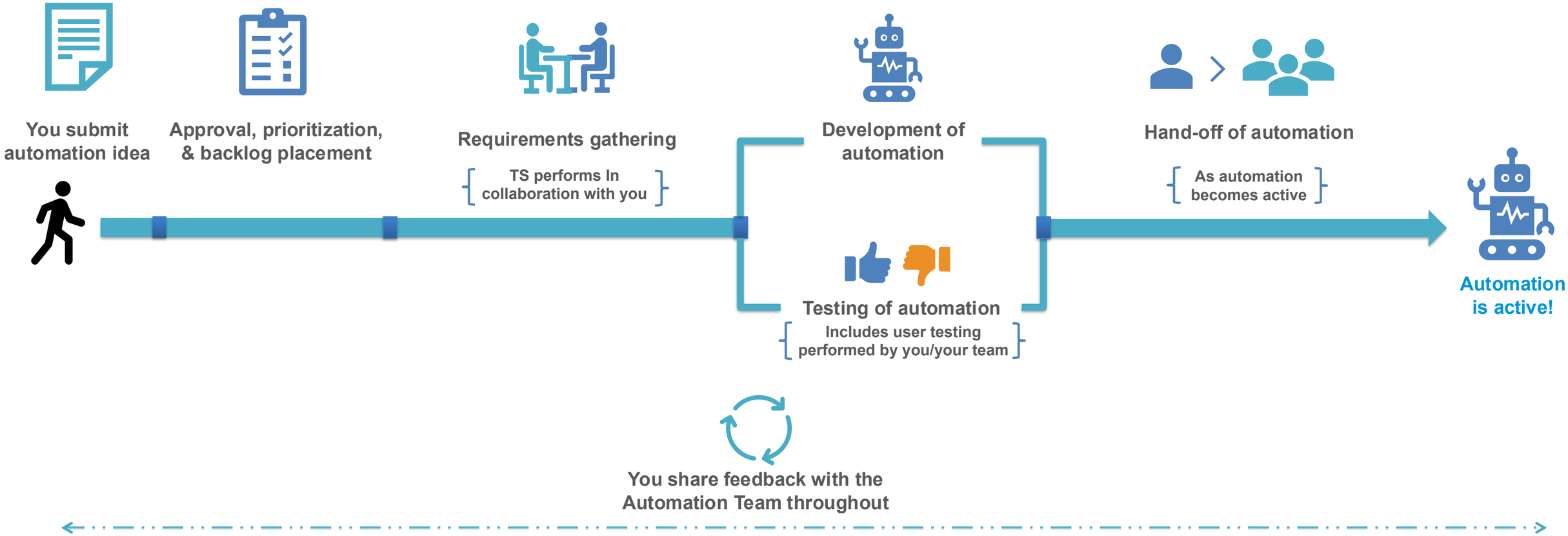

Key: Automation Customer Activities | TS Automation Team Activities

Submit a service now ticket here: https://ccdservice.service-now.com/esc?id=sc_cat_item&sys_id=02d300cf1b2c1510e2c4635b234bcb1c

Accessibility

State and federal laws require that all digital information must be accessible to people with disabilities. Digital forms may also be more accessible than paper forms!
Most of our approved tools can create accessible online forms or PDF forms.
Reach out to our TS team for training or if you have questions!

Agency Examples

SME's

- DOTI Fleet team
- DOTI Graffiti Abatement Form
- Inspection Reports
- DSBO Forms
- DPR Plant ordering process
- CORA Intake Requests
- Contracting Requests
- Workflow for City Council request for Agency information

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Final Tips

- Begin collecting new data digitally before transferring old documents into the digital space
- Create a “shred-a-thon” day with a designated day for your team to support the transition

Questions

Thank you!