



KONICA MINOLTA



FEDERAL RECORDS MANAGEMENT: RACE TO THE FINISH



DIGITAL TRANSFORMATION AND RECORDS MANAGEMENT EXPERIENCE

▶ 25+ years as record management and document conversion organization digitizing approximately 3 billion documents for Federal customers

▶ Supported virtually every Federal agency with digitization, record management and Electronic content management services and support during that tenure

▶ Provide paper to cloud record management transformation assessment, planning, execution, delivery and post support

▶ Provide turnkey onsite and offsite digital conversion services to meet NARA compliance requirements

▶ National organization with 100+ offices across the country

▶ Provide complete record lifecycle management from the point of capture to disposition or archiving

▶ Global network of partners with software implemented in over 14 countries

MEET YOUR HOSTS



PAT BRIM

Pat Brim is the Director of Public Sector for Gimmal with extensive experience in Records and Information Management.



RUSS SAVEE

Russ is a Senior Sales Engineer with Gimmal. His extensive experience with Gimmal products and within the larger discipline provide a unique insight into how records managers can respond to the challenges they face.



MIKE RATIGAN

Mike Ratigan is the Vice President of Sales for DocPoint Solutions and QAI and has over 25 years of consulting experience helping customers modernize their business using, SharePoint and records management platforms.



SCOTT MONEY

Scott Money is the Director of Operations for DocPoint's national practice and leads the design, develop and support teams for Federal and commercial engagements.

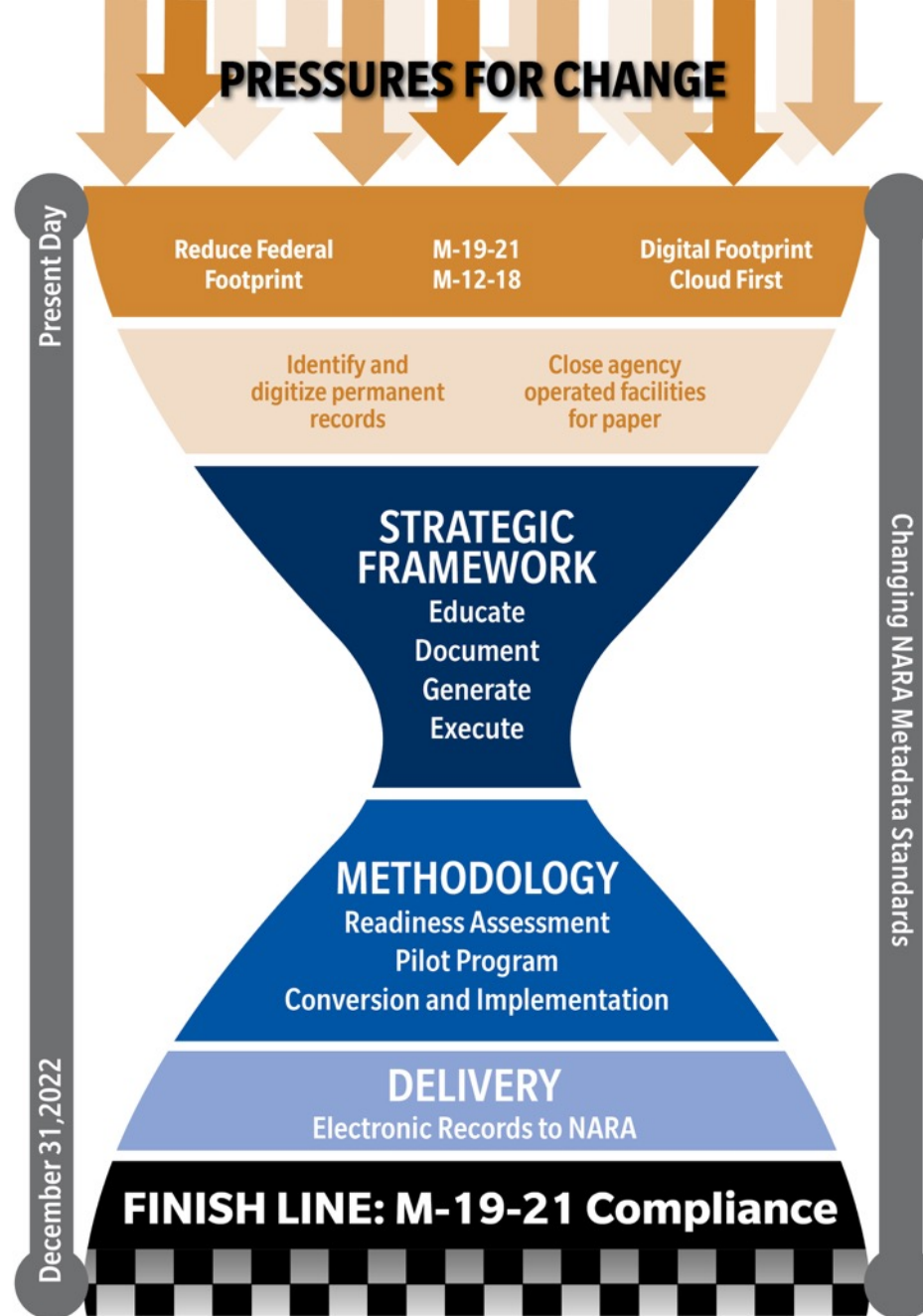
AGENDA

- Review Agency Specific M-19-21 compliance Challenges
- Review the Strategic Framework to Becoming M-19-21 Compliant
- Review the Paper to Cloud Conversion and Implementation Approach
- See a Live NARA-Compliant Paper Record Conversion and Record Management Demonstration
- Understand How This Will Benefit Federal Agencies
- Q&A – “Ask the Experts”
- Next Steps – Gimmel and DocPoint Special Offer

AGENCY SPECIFIC M-19-21 COMPLIANCE CHALLENGES

- How to determine the volume for digitization once the temporary and permanent record status has been finalized
- How to incorporate different file plans into an overall strategy to get divisional buy in to an enterprise approach (each divisional office needs their own file plan)
- How to manage and standardize assessment nationally and locally
- How to standardize the entire digitization processes to include digital content ingestion along with paper document preparation, scanning, indexing and electronic delivery
- How to create streamlined way to auto-classify documents for automated ingestion into a records management solution
- How to provide the flexibility to save content into multiple storage platforms such as SharePoint, Box and file shares to maximize user adoption and allow customers to maintain autonomy of data
- How to provide a solution to manage the day forward process that is simple and easy to use within a COVID-19 and M-19-21 business environment

M-19-21 AGENCY PLANNING APPROACH



Conversion and Implementation



Offsite



Onsite



Day forward

Index according to agency and NARA
metadata requirements

On prem or cloud-based records management solutions

Import
and auto
classify

Apply RM
rules based
on Agency
file plans

Provide
reporting
and audit
trails

Provide day
forward
real-time
ingest

Prepare
records
of NARA
transfer

Agency ECM
Systems

Box

SharePoint

File Shares
"Records in place
storage"

DELIVERY Electronic Records to NARA

FINISH LINE: M-19-21 Compliance

PAPER TO CLOUD COMPLIANCE DEMONSTRATION



SUMMARY OF BENEFITS

▶ Simplified solution for end users to scan paper documents or upload “born digital” documents

▶ Solution will support all types of source data for digitization to include grants, contracts, HR documents, magazines, faxes, bound books, microfilm, microfiche, video tapes, audio tapes, CD's, DVD's, and more

▶ Streamlined search of organizational documents as well as search across the enterprise repositories (with permission) resulting in less time searching for important documents

▶ Support the ability to scan, index and upload or access documents from remote/telework locations

▶ View audit trail for all activity associated with each record for compliance and security

▶ System will adapt and change with end user expectations



NEXT STEPS

**Schedule a FREE virtual assessment (\$800 value)
with the Gimmel and DocPoint teams:**

- Assistance with reviewing current record management and file plans
- Provide guidelines for determining volume of permanent records eligible for digitization
- Provide guidance to help meet the M-19-21 requirements



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