



Are You Image Ready?

Moving from paper to electronic images may seem simple, but there are many items to consider before you start scanning. A key component to a successful electronic migration is creating a plan that allows you to address potential issues before they arise.

Consider the following questions when considering imaging:

- Will the documents be scanned for back-up purposes or as part of an active use plan?
- Will you scan the entire file or just core documents?
- How will the documents be indexed to ensure you can find them when you need them?
- What are the pros and cons of conducting a back file scan vs. a day forward plan?
- Who will need access to the documents?
- Is remote access required?
- When in the life cycle should you scan?
- What is the right equipment for your day forward scanning?
- Will your retrieval system need to be integrated with your legacy systems?
- How will retention be managed?

Most importantly, what are the components of implementation and how do you create a realistic budget to meet your objectives? Often times businesses are either quickly discouraged by the anticipated costs of digital conversions but there are options for every budget depending on your overall objectives. Perhaps there is a core set of documents that require access by multiple employees; scanning just these documents could provide an immediate ROI on wait time and response to your customers. Analyzing how your files are currently accessed and used is a key component to developing your digital conversion plan.

Document Preparation, indexing, scanning, reassembly, archiving or shredding must all be considered as part an imaging plan. Additionally, there are many things you can start doing today that will save you both time and money when you're ready to start scanning. By utilizing some form of database, either through barcode labeling

or even something as simple as an Excel or Access application to print your file labels, you can save time and money during the indexing stage of imaging.

Finally, it is vital that your plan take into consideration the day forward resources and workflow of keeping your records current. Will you destroy the paper record after a back-file conversion? This works if only a core set of documents are imaged; however if your intention is to create a true digital record, keeping the paper record around can be very risky.

Finally, be realistic about your existing resources. While document preparation and indexing are the primary cost adjusters, they are also one of the most critical components of a digital conversion. Documents that are incorrectly indexed will likely wind up in the same place those “single socks” go! Better to do less over a period of time than cut corners on a large project.

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