

Top Tips for Scanning Paper Archives

On the surface, scanning paper seems like a very simple task. Most companies dive into projects to get rid of file cabinets and quickly realize that they were not fully prepared. Scanning equipment, staff, and even the paper being digitized is not always cohesive. Not all paper, scanners, or people operate the same when charged with a digitization project. Below are 10 tips on how to be more prepared for your scanning project.

- 1 Estimate Project Size** Determine how much content needs to be scanned by way of linear inches, number of folders, or boxes of paper. A bankers box can take as few as 2 hours to complete or as many as 20, depending on the many factors explained below. Make sure the content is organized in a consistent fashion. If you stack paper flat in one box, but lay it vertically in another, you will not be able to accurately estimate hours of scanning/labor and ultimately not be able to determine cost or staff accordingly.
- 2 Organize Documents** Determine what content can be simultaneously scanned. One of the keys to efficiently scan paper is to reduce the total number of scans. If you can scan a folder of content as a single file vs. each document inside the folder individually, you can dramatically reduce the time to complete a project.
- 3 Prep Documents** Prep the content. Staples and wrinkled or torn paper can be a bane to a scanning project. Be sure to have a designated person to prep content, ensure staples and binding agents have been removed, and smooth out the paper for the scanner. Paper jams can cause big problems and staples can damage equipment.
- 4 Naming Convention** Agree on a common file naming convention. This task can be tedious as it can affect the entire organization, but it is essential. Anyone that touches documents must be trained on how to properly name each type of commonly used document, otherwise searching and organization in the future can ruin a project. You do not want to move from an office of paper clutter to an office of digital clutter. A clean naming convention is key.
- 5 Folder Structure** Build or plan the folder structure in advance. Organization of content is extremely important. Make sure you have thought through exactly how and where you want documents stored. Think about things like who should have access to specific files- clients? Internal staff? Only the exec team? Vendors? Plan the folder structure tiers based on access levels and security needs around the content, not just something as simple as alphabetical or numerical order.



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- 6 Content Management** Select where you will store the content. Are you planning on moving to a cloud content management system like Box, Egnyte, or Sharefile? Do you prefer to store it locally on a shared drive? We have another knowledge sheet to assist with making this determination; however, be sure to know where the content will reside in advance of scanning so you can organize it properly.
- 7 Scanning Equipment** Once steps 1-6 have been planned, start thinking about the scanning equipment and software needed. Determine if Optical Character Recognition (OCR) is important for keyword searchability of your documents, and what percentage of the document should be OCR'd- just the first page? The whole thing? Do you have oversized documents to be scanned? How large is the scanning project and how many pages per minute can a scanner process?
- 8 Staffing** Designate staff. Often, companies don't think the scanning process is very complicated and rotate staff in and out on projects to keep them fresh. Unfortunately, this strategy almost always leads to inconsistent scans, names, and organization. Find the staff you want to manage the project, have them each scan, name, and organize a small cross section of documents and select your best team from these results.
- 9 Quality Assurance** Spot check the project as it progresses. Make sure staff is operating on schedule and if not, determine the factors that caused delays or acceleration and react accordingly to the new information
- 10 Stay Digital** Make a plan to keep all future content digital- switch to electronic receipts, invoices, contracts, signature, faxes, and train staff to hit "save as PDF" instead of print, for example. For all remaining paper documents that are out of your control, develop a plan to get them digitized as soon as possible.

Once you have gone through this exercise, especially the planning phase and executed a cost analysis, you'll be able to determine if you want to keep the project in house or outsource the project to a third party. For any questions or guidance on a similar project, reach out to info@dashdata.com or [844-746-3274](tel:844-746-3274) (844-7-GO-DASH) and we can assist with your plan

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