10 Steps for Preparing and Organizing Your Document Scanning Project
10 Steps for Preparing and Organizing Your Imaging Project

Do you have closets where no one dares to open the door? A store room that resembles the Twilight Zone – people enter and then disappear for hours at a time? Perhaps the sheer volume of paper has become overwhelming. Whatever the reason, you’re thinking it’s time to do something with all that paper. So, how to get started?

We’ve created this guide to help you understand the process from beginning to end, from planning to storage. Let’s get started.
1. Begin at the end

It’s always helpful to begin any project with the end in mind. How will you use the scanned information? What do you want as your end product – do you simply need a digital backup of paper documents that can be stored on a hard drive, DVD or thumb drive? How do you want to access your data? Do you plan to repurpose your content?

If the document contents (data) will be made available across departments, the organization or to the public, that needs to be taken into account. You will need to have some type of indexing included that will make it possible to find the documents you need. If you have an Information Management System (IMS), you’ll need to include the specifications, such as the metadata format for loading the content into your system.

Pinetec will need this information before creating the index files. Your IT department can furnish you with the required specifications. Not planning to have the project in your IMS? You’ll still need to determine how you wish to store your data.

Note: Common data file types for indexing include XML, XLS, and CSV.
2. What to include

After figuring out how the scanned documents will be used, you need to think about which ones need to be included. Some documents may have long outlived their usefulness and have no real value in converting to digital. Make sure you exclude those when determining the scope of the project – there’s no need to spend money on scans you don’t need. There may also be multiple copies of the same document. Doing an audit of your files to eliminate duplicated and unnecessary documents will save time and money.

Once you know what to include, you’ll need to determine the approximate count of pages that require digitization. Remember that some document types are priced differently than your standard one- or two-sided letter pages. Most projects will be on standard 8.5 x 11 paper, but you may have oversized documents such as engineering drawings or maps that will necessitate the use of a large format scanner. Pintec can scan those as well. Also, be sure to inform us if pages that contain color need to be scanned as color images.

Note: Auditing your files will help eliminate duplicate and unnecessary documents.
3. Where are your documents located?

Are your documents taking up valuable space in your office or at a storage facility? You don’t have to pack all the materials and worry about shipping it to us—we can pick up or deliver for little or no charge. If you are outside of the Greater Richmond area, we can provide a service to pick up your documents and deliver them to us.

Need to have your documents scanned on-site? Pintec can do that too.

Note: On-site scanning will add to the cost of the project.
4. How will the documents be organized?

Determine how a project will be organized. At what level do you need the files to be accessible? For example, you have multiple boxes of documents for one project. Do you want the complete project in one file? Perhaps you would need it broken down into a more granular method, such as all purchase orders, invoices, and correspondence related to the project scanned as individual files for easier searching and access. Questions to consider:

- How will the information be accessed?
- How often will it need to be retrieved?
- Who will have access to the information?

Note: If you have trouble figuring out the best way to organize your files, please contact us.
5. Budget and Schedule

Large projects can take months to complete. Is there a specific deadline you need to meet? Can the project be spaced out longer – and possibly save you money?

Know your budget. You will need to estimate how many pages will require digitization. A rough estimate can be developed using the following:

- Filing cabinets: An average 4-drawer cabinet can contain approximately 15,000 to 20,000 pages.
- Standard bankers box can hold up to 2,500 pages.
- Each side is counted as a page, i.e., a two-sided document counts as two pages.

Note: Pinetec will work with you to be on budget and on schedule.
6. Keep track of your documents

Pinetec will supply you with up-to-date production statistics. Clients can log on to a private page on our site that shows the status of all materials delivered to us. This site also allows you to view and check the quality of the project. Once approved, the data will be delivered to you in the format of your choice. Or we can store your information in an IMS that would be accessible to your organization.

Note: Develop your own label or tag for naming the document groups, such as “Invoices” or “HR”. If you need help developing a system, we can provide suggestions on tagging and tracking protocols.
7. Decide how your data will be stored

The mountains of paper will be turned into many megabytes of data. How will you store it? Some options include:

- **Cloud** - Remote storage - the Cloud - is becoming more prevalent as people need to access information from multiple locations. A reputable cloud service offers the protection of your data in case of some disaster at your onsite storage location.

- **Thumb drives** - Portable and easy to use, thumb drives come in a variety of sizes, shapes and capacity. They can be a great way to share information.

- **Hard drives** - The cost per gigabyte and terabyte of memory continues to decline for all storage and that holds true for hard drives as well. They are portable and can be safely stored off site.

- **Compact discs** - Although not nearly as popular as before, some clients still prefer their data stored on DVDs.

Note: Each method of storage has its pros and cons. We will be happy to help you pick the right option for your needs.
8. What to do with the documents after completion

Now that your project is complete, what happens to the paper copies? We recommend keeping the documents for a short period of time in case something needs to be rescanned. After that waiting period, the documents are typically shredded.

Note: Pinetec offers a shredding service for an additional fee.
9. Should you do it yourself?

You may be thinking of saving money by bringing the project in-house or perhaps hiring a temp or an intern to handle your scanning project. Though there may be some short-term cost savings, there are some risks:

- That person will need to be trained in all aspects of production, from operating the scanner and software to quality control and conversion into your IMS (if required), and they will be learning on your dime. We know the most common content management systems in use and are able to deliver your content in a consistently structured format.

- Once the job is complete, there is no liability for mistakes or quality issues you later discover the temp or intern may have made.

- You will need to lease or purchase the scanner and software, or tie up the office machines. Do you have room to set up the necessary equipment?

- Who will handle the indexing? A staffer, the temp or someone else? Be sure to figure in those costs.

Note: If you decide to have the scanning done on-site, a trained representative from Pinetec will be less disruptive to your staff.
10. Other things to consider

- Contracts are not necessary, but they are important. At Pinetec, we are comfortable working with our clients with or without a contract, because we believe in establishing good communication and attention to detail from day one.

- If you think your job is too small, but there still isn’t time to do it in house, contact us. Whether big or small, we will provide the same quality of service.

- Are special clearances needed to scan a project? Contact us for more information about any specific circumstance surrounding your project.

- You have an oversized project and you don’t have the equipment to scan it. Don’t worry - we do. We have scanned engineering drawings to antique books without compromising the original documents.

- While occasional scanning in the office is more cost-effective, scanning many files can be a big time-waster on your staff and bottom line. Let us do the work for you, and get your employees back to business.

- How much is it going to cost? Pinetec can talk to you about your project and give you an estimate.

Note: Pinetec provides very competitive pricing to our clients. We would be happy to set up a time to meet you and discuss your project. Please contact: info@pinetec.com or 804.752.1667.
We hope these basic guidelines for preparing for your document scanning project have been helpful. Don’t hesitate to give us a call at 804.752.1667 or email info@pinetec.com if you have questions or would like to discuss your project.