

The 5 W's of Planning a Digital Imaging Project (Webinar)

Is Imaging Right for the Records?

When does it make good business sense to scan paper records? While there are no hard-and-fast rules for when you should *definitely* scan or not scan, here are some factors to guide the decision of whether scanning is right for the records:

PROBABLY	PROBABLY NOT
Active records: frequently used or requested	Inactive records: rarely used or requested
Short retrieval time is necessary	Retention period will be met before Return on Investment (ROI) is realized
Multiple people need access to the same record	No ongoing maintenance/storage budget available
Return on Investment (ROI) possible before expiration of retention period	Replacing the paper original of a permanent record as a preservation strategy
There are sufficient resources to support the system over time	No feasibility studies have been conducted

Activity Level

If the records are **active** – being frequently used by staff, frequently requested by the public or other agencies – then imaging is probably right for the project. If **no one** is ever asking for them, then they may not need to be digitized.

Retrieval Time

If a short **retrieval time** is necessary – if it's a record that's requested often and it's burdensome or time-consuming to your staff to have to track down a paper folder, imaging is probably right. If multiple people need access to the same record at once, or if that access needs to be constant (it always needs to be available on your website, for example), then imaging is appropriate.

Return on Investment (ROI)

If you'll see a quick Return on Investment – and you'll realize that ROI before the expiration of that record's retention period – then scan it. If the record will meet its retention period before you've recovered the cost of scanning it, it's not worth the money.

Ongoing Maintenance/Storage Costs

If there are sufficient resources to support the system over time – the hardware, the software, the continual creation of metadata for each record, the staff time – then scanning is appropriate. If you're

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going to face problems getting that system upgraded or repaired down the line, or if you are at the limit of what you can pay to store and there's no money to continue scanning a particular record series – then you might want to wait until you have secured those resources.

Scanning as a Preservation Strategy

If you are scanning something because it's a permanent record and electronic records seem easier to preserve over time than paper records – this is not a good reason to scan. Consider the risks and costs of long-term digital preservation (migration, ensuring authenticity, preserving functionality) before you replace a permanent paper record with an electronic copy. Digital imaging should be used to improve *access*, not for long-term *preservation*.

Scanning ALL THE THINGS!

If you want to image because it just seems like a good idea to “go paperless”...then odds are, no feasibility studies have been conducted and you shouldn't move forward until they are.