

## **Six Tips to Master Document Prep and Scanning.**

The decision to go "Paperless" prompts a series of decisions that need to be made in order to have a successful transition. Visions of "no more paper" and "no more file cabinets" may detract from the reality.

Before you run out and buy the scanner (see "Choosing a Scanner") that is on sale for \$99.95 or the really nifty MFP (**m**ulti-**f**unction **p**rinter) you need to consider your work environment.

How much space you have to work with and the physical layout are the just the beginning. A plan on how to deal with the internal documents (documents you create) and external documents (documents that come from outside your office) needs to be made.

Second, consider the amount and type of documents on paper currently in your office and/or document storage locations. Will these documents be scanned (backfile conversion) or left to be purged as a part of a "Records Retention Program"? If you decide to do backfile conversion (scan the old records) will you begin scanning with the oldest first or last? Do you need to scan all of the old documents As Soon As Possible or is possible to wait and scan an old document as it is needed.

With these decisions made you can begin with "Document Preparation."

What is document preparation? Basically, it is doing whatever is needed to get the document ready to be scanned. Scanners tend to jam on pages that are stapled or paper-clipped together or have sticky notes or other pieces of paper taped to the document. Pages that are torn or folded will need to have the tears taped and the folds opened. Sticky notes or other papers attached to the page need to be examined to see if they cover information on the page. With scanned documents you cannot "lift" a sticky note to see what is underneath.

Other Document Preparation considerations include:

1. Where will the documents be scanned to? Do you have a specific folder or folders for these scanned documents?
2. Do the documents need to be scanned in "color", "grayscale", or "black and white."
3. Do the documents have handwritten notes or thermalfax pages.
4. What resolution (dots per inch [dpi]) do the documents need to be scanned? 200 dpi is usually the minimum resolution needed to do Optical Character Recognition (OCR).
5. Do the documents contain information on both sides of the document (duplex) or one side only (simplex).

6. Are the documents all the same size or are they of mixed sizes? Today's better scanners handle a variety of paper sizes (from business cards to legal) and types (onion skin to heavy bond).
7. Are there pictures / photographs? Are the pictures in color, sepia, or black & white?
8. How many documents need to be scanned in total? How many documents need to be scanned per day to timely complete the project? Scanners are rated by a DDC (Daily Duty Cycle). The DDC is determined by scanning a letter sized (8.5" x 11") in Landscape (sideways) mode at 200 dpi in black and white.

With proper document preparation your scanning project will go smoothly and quickly.