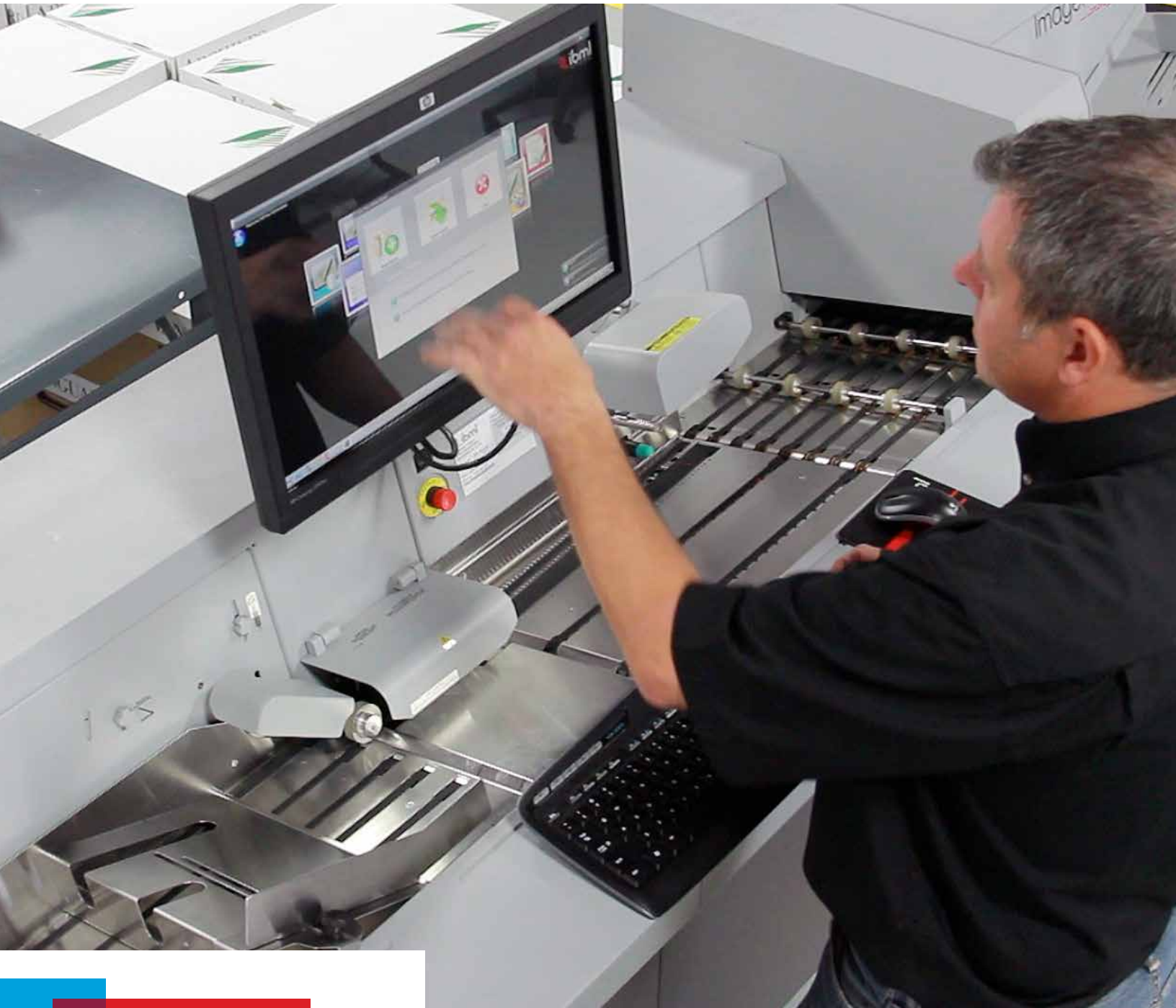


Budgeting Your Imaging:

Six Overlooked Cost Factors



What drives the cost of a document imaging project? If you guessed the number of documents to be scanned or the linear file inches involved, you would be correct. But this is only part of the story.

To accurately estimate the cost of an imaging project (and avoid budget over-runs) it is necessary to go a little deeper and look at the actual mechanics of the imaging process.

Document imaging projects are complex undertakings, with many moving parts and many variables that can impact the final budget. Unless you have managed many imaging projects, it is hard to estimate a budget accurately. As the expression goes, you don't know what you don't know!

With that in mind, we have put together a list of commonly overlooked cost factors that can drive up the cost of a document imaging project. This will help you estimate the cost of your project more accurately and ensure that you stay on budget.

1. Collection Hygiene

Over time, in any collection, documents accumulate that you do not necessarily want to digitize. These include: duplicates, non-value adding correspondence, and records that have passed the required retention period.

Why add to the cost by scanning reams of duplicate copies or information that is no longer needed?

Expert Tip

The more information you can provide about the collection the better. Ideally, you would send an accurate, up-to-date electronic manifest that will allow your provider to quickly process and validate the files you have sent.

Expert Tip

Conducting a file audit is a great way to ensure that you only scan what you need.

A thorough file audit will help make sure your collection is "clean", meaning irrelevant and duplicate material is removed, and the information is correct, with the right version in the right place.

Additionally, a file audit can identify any files that are missing critical documents. This gives you an opportunity to locate the missing documents and ensure that they are inserted into the file prior to the imaging process, thereby ensuring record completeness.

2. Collection Intake and Inventory

When your imaging team or outsourced provider receives the collection to be imaged, their first priorities will be to preserve the "chain of custody" and create an accurate picture of every record that you have sent.

There are a number of ways this can be done, but the bottom line is that the longer it takes to validate the collection inventory, the more this step will cost.

If the information they have to work with is not complete (which can happen with an outdated manifest, for example), the imaging team may have to conduct a full inventory, opening every box and confirming the contents manually. This would add significantly to the cost.



3. Naming Convention, Metadata, and Indexing

Another potential cost driver is the process of applying the required naming conventions and metadata to the converted files.

As you can imagine, going through every file and manually applying the naming convention can add a lot of time and expense to the project.

Expert Tip

A complete, up-to-date electronic manifest is a big time saver during this process. It allows the provider to apply the naming conventions directly to the converted files, saving manual work.

Similarly, if you require additional metadata fields to aid with document search and retrieval, this too will add to the cost. The same applies for any metadata that will need to be added in order to meet regulatory requirements or industry information standards.

4. Imaging Detail & Preparation

Another big factor in the cost of the project is the level of imaging detail required for each file. Obviously, the more detailed the level, the more expensive the file preparation, scanning, and indexing.

There are three levels of scanning to consider:

File Level: This is the least detailed level of scanning, in which the entire contents of a file are scanned as a single image. This is typically a PDF document with Optical Character Recognition designed to streamline access to a document or data without the need to drill down to a more granular level of indexing. This level is typically employed when scanning legacy files, archived files or infrequently accessed records.

Divider/Partition Level: This is a more detailed level of scanning, in which each section of a file (broken up by dividers) is scanned as a single document. Each document within a file is organized, imaged and indexed under one of the partition categories. Consequently, each file is separated by virtual dividers, allowing for expedited access to information without going to the time and expense of indexing at the document level.

Document Level: This is the most detailed level, in which every document is scanned into a separate PDF. Here, various data points for each PDF need to be considered. When making decisions on the data points to be captured, it is important to remember that each additional data point will increase the time to process a document or file, which will affect the project timeline and cost, as well as the required industry knowledge of the person prepping the file.

Expert Tip

Deciding which level is appropriate is largely driven by end-user considerations. Who uses the information and why? How often will they need to access the information?

5. The Quality Assurance (QA) Factor

You want to ensure that your scanned images are as accurate as possible, but accuracy requires time, which equals money. Typically, imaging providers will conduct QA on the scanned images to achieve a target percentage of accuracy.

For example:

- 95% accuracy = reviewing only a sampling of all scanned images
- 98% accuracy = reviewing all scanned images
- 99.5% accuracy = reviewing all scanned images and comparing them directly with the original physical document

Again, the more involved the QA process and the more manual input required, the higher the cost. As you budget your project, give some thought to which level of accuracy will meet the needs of your organization and workers.



6. File Reassembly

Once your physical files have been imaged, your provider will have to put them back together. How they do that, and how much time it requires will impact your total cost as well.

Expert Tip

For most organizations, the processes associated with 95% accuracy are sufficient.

Files can be reassembled as follows:

- Loose: all documents placed loose into the correct file, but not re-assembled or put in the same order they arrived
- Pinned: all documents replaced and pinned together to allow for a review if needed, but files won't be reassembled exactly as they arrived
- Full Rebuild: the file is put back together exactly as it arrived

Talk to TAB

We've helped hundreds and hundreds of companies image their records. Here's why they work with us:

Expert Tip

Choosing the file assembly option that is right for you is driven by how the file will be used in the future. For example, if the physical files will be archived offsite at the conclusion of the imaging project, then loose reassembly may be the best selection. For files that will be referred to occasionally, pinned is a better option than loose. Files that will continue to see active use often require a full rebuild.

Our Experience






We've been helping companies with records management for decades. This means we've developed a deep understanding of the records management challenges faced by today's businesses, and more importantly, how to solve them, particularly when it comes to imaging engagements.

Our Management, Knowledge Workers and Processes Imaging records requires specific knowledge of how business in different works and how the information is used. Through our extensive records management experience we've developed a deep understanding of businesses in every vertical. When you hire TAB, you get:

- An experienced project management team
- The ability to provide recommendations and suggestions specific to the driving need and reason for the imaging initiative
- Knowledge workers with extensive experience in your business including document identification and the various indexing points
- State of the art equipment and software capable of handling the various document formats you will encounter during your imaging project
- The flexibility to quickly increase resource count, processing equipment and production hours to meet required deadlines
- The option to process files onsite or offsite - or a combination of both



For more information on TAB's solutions, please get in touch:

-  tab.com
-  **US: 888-822-9777**
-  **Canada: 800-417-8010**
-  **TABONRECORD**
-  **TABPRODUCTS**

