6 Tips for File Digitization

Want to enjoy the benefits of a paperless organization?

Here are 6 tips for tackling a file digitization and implementing a document management solution.

1. Choose between scanning in house or outsourcing

Identify all costs for digitizing your files in house and compare those costs against the outsourcing price. Costs can include labour, utilities, office space, equipment, maintenance, supplies, and time (opportunity cost).

2. Consider a day-forward scanning strategy

A day-forward strategy allows you to **scan new documents as they come in**, but keep your paper files as they are until they reach their destruction date. This is a great option if you must retain documents for compliance purposes, but don't access them often.

3. Evaluate the preparation process

Documents that will be scanned must first be prepared to get the best scan possible. Paper clips, staples, and sticky notes need to be removed, bound documents need to be separated, and everything must be properly organized to optimize speed and accuracy. If this sounds like a lot, **an outsourced file conversion can include this service as part of the solution.**

4. Ensure your documents will be easy to search for and find

Make sure that your new document management solution has a simple, secure repository that makes it easy to **search for and find what you need when you need it**. What fields will you need to be searchable? Determine your indexing requirements early in the process to make your transition to paperless as seamless as possible.

5. Do your research

When considering outsourcing a file conversion you should be able to visit the service provider's facilities. Make sure they have the hardware and software capabilities for the job, along with the staff needed for the scope of work. **Security designation such as 'Protected B' can provide confidence** that the provider has been evaluated and deemed a safe and secure operation.

6. Test quality output

Before fully committing to an in-house or outsourced file scanning solution, **do a test run to make sure you will be happy with the image quality and functionality**. Will you be able to find the document when you need it? Will all the information you need be there? Will you be able to clearly read the document? These are all extremely important questions you need to be able to answer before moving forward with a solution.

[Interested in digitizing your files? We're happy to answer all of your questions – Click here to contact us today!](#)