

Digitization Project Planning Checklist



The following checklist will assist you with planning your digitization project.

What are your reasons for digitizing?

- ☐ The records are part of an active business process or function
- ☐ The equivalent information in the records is now recorded in digital form (i.e. "born digital" information)
- ☐ The records contain a rich information source required by current business processes
- ☐ The information in the records is enhanced by being available in digital form (e.g. additional indexing, sorting capability)

Other reasons:

For guidance, see Step One: Plan to Digitize in the Digitizing Government Information Guide

What will be digitized?

- ☐ Records covered by an approved/pending information schedule
- ☐ A coherent and complete set of records
- ☐ A selection of incoming source records
- ☐ Records in a standard format that can be digitized
- ☐ Records to be retained for a long time or will be transferred to the government archives (i.e. due to legislation or an information schedule)

For guidance, see Step Two: Assess Records in the Digitizing Government Information Guide

When will you digitize?

- ☐ Roles and responsibilities have been clearly documented, identified, and communicated for staff across all processes

The records will be digitized by:

- ☐ Government employees ☐ Service provider(s) ☐ Both

- ☐ A Privacy Impact Assessment (PIA) has been completed, if required. *Consult your Privacy Officer to confirm whether this is needed.*

For guidance, see Step Three: Develop a Defensible Process in the Digitizing Government Information Guide

How will the records be digitized? (continued)

- ☐ I have documented procedures for preparing and digitizing the source records and post-digitization processing
- ☐ I have determined whether any special physical preparation procedures are needed, and developed them if so
- ☐ Digitization equipment and software requirements have been determined
- ☐ I will run text recognition (Optical Character Recognition [OCR] software) on the digitized records

For guidance, see [Prepare & Digitize](#) in the [Digitizing Government Information Guide](#)

What information do you need to add about the digitized records?

- ☐ Metadata requirements have been determined
- ☐ All/most of the metadata can be captured automatically

The following metadata will be added manually:

For guidance, see [Step Five: Compile Metadata](#) in the [Digitizing Government Information Guide](#)

How do you assess the quality of the records?

- ☐ Verify that the digital copy matches the source record
- ☐ Verify that the digital output matches the quantity of the source records

Types of errors to look for:

Percentage of digitized records that will be assessed:

When QA will be performed:

For guidance, see [Step Six: Assess Quality](#) in the [Digitizing Government Information Guide](#)

How will the records be stored and managed?

- ☐ The source records will be destroyed
- ☐ Approvals required in the Redundant Source Records Schedule (schedule 206175) have been obtained

Period of time source records will be kept for QA before destruction occurs:

- ☐ The source records will be returned to offsite storage

The digitized files will be transferred securely via:

How will the records be stored and managed? (continued)

☐

Secure File Transfer Protocol

☐

A shared drive with my service provider

☐

OCIO's Secure File Transfer Service

Other:

☐

Further action arising from the digitized record will be documented in digital form

For guidance, see Step Seven: Store & Manage Records in the Digitizing Government Information Guide