

Digitization Quick Start Guide

01

Plan to Digitize

- What are the benefits, challenges and reasons for digitizing records?
- What resources will you need?
- Who will authorize the digitization activity?
- What is the level of risk for your organization?

- ▶ Plan to Digitize
- ▶ Tools & Resources
- ▶ Risk Assessment Matrix
- ▶ Roles and Responsibilities



02

Assess Records

- Are your records covered by an approved information schedule?
- What is the retention period and final disposition?
- What records need to be digitized, how many, and when?
- Can the records survive a digitization process?

- ▶ Which records should be digitized?
- ▶ Records management requirements
- ▶ Contact your Records Team



03

Develop a Defensible Process

- What is your digitization approach?
- Who will scan the records?
- Where will the work take place?
- What are the technical requirements?

- ▶ Develop a defensible process
- ▶ Digitizing Government Information Standard
- ▶ Planning checklists
- ▶ Documentation



04

Prepare & Digitize

- How will the records be prepared for digitizing?
- Is special handling required?
- Will the work be outsourced?
- What are your digitizing and post-digitization procedures?

- ▶ Physical preparation
- ▶ Digitizing options
- ▶ Digitize
- ▶ Post-digitization processing



05

Compile Information About the Records

- What metadata needs to be captured?
- What are the document naming conventions?

- ▶ What is metadata?
- ▶ Metadata requirements
- ▶ How to apply metadata
- ▶ Naming conventions



06

Assess Quality

- What level of quality assurance is needed?
- What errors will you look for? How much error is allowed?
- Who will carry out the quality checks?
- How will you deal with errors?

- ▶ Quality assurance process
- ▶ Implementing QA
- ▶ What is an error?
- ▶ How to run QA



07

Store and Manage Records

- How will the original records be managed after digitization?
- How will the digitized records be securely transferred?
- Where will the digitized records be stored and managed?
- Is there a secure office recordkeeping system?

- ▶ Managing original records after digitization
- ▶ Transferring digitized records
- ▶ How will the digitized records be stored, managed and accessed?

