Digitization Quick Start Guide

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



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

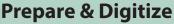


Develop a Defensible Process

- 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



- 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



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



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 OA



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?

