How to Plan a Digitization Project



develop a rationale for your digitization process



identify the necessary resources



include a realistic budget



consider the challenges



address the minimumrequirements in the **Digitizing** Government Information **Standard**



plan the

workflow





ensure that records management requirements are being met



reporting lines, and communications for staff across all processes



select a digitization approach



digitization location



when the digitization will occur



who does what



how to transport the records



security & privacy requirements



document your decisions, processes and procedures



technical specifications



where the digitized files will be stored



authorized destruction of source records



official file copy or not?

bulk process or ongoing











prepare source records

determine whether the digitization will be carried out in-house or by a service provider

document procedures for digitizing and post-digitization

(including OCR)

determine metadata requirements







Test your QA measures with a sample

















ensure that digitized records are securely transferred



review the QA process periodically

consider how the source records will be managed after digizing or if they will be destroyed

retain digitized copies in an appropriate recordkeeping system in accordance with the appropriate information schedule

