



Document Conversion Project Guidelines

*A Guide and Checklist for
Document Conversion Projects*



Scan



Index



Format



Use

Bud Porter-Roth

Part 1 - Conversion Guidelines Table of Contents

Introduction.....	1
What is Document Imaging?	1
Business Benefits of Document Imaging.....	3
Document Conversion Strategies and Concepts	4
Which Conversion Strategy is Best?.....	6
Ensure QC.....	8
Conclusion	8
Helpful Document Conversion Metrics	10

Part 2 - Conversion Checklist Table of Contents

Introduction.....	1
General Considerations.....	1
Document Description and Volumes	3
Cleaning the Files	5
Document Pickup.....	5
Document Preparation and Assessment.....	6
Batching	7
Scanning.....	8
Exception Handling	8
Image Quality Control	9
Indexing	9
Data Entry from Image	11
Document Security.....	12
Data Quality Control.....	12
Records Management.....	13
Image Output Format.....	13
Data Output Format	13
Turnaround Time	14
In-process Requests for Documents.....	14
Scanned Image and Index Data Upload.....	15
Physical document Reassembly	15
Disposition/Document Return	15
Project Reporting	16
Acceptance Test.....	16
Warranty	16
Pricing.....	17
Document Archiving Standards.....	19
Conclusion	19