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READERS' BEST TIPS

Edited By *Maria Medina*

Successful Backfile Conversion

Steps for Preparing, Scanning, Indexing and Testing

- 1. Examine document handling.** This process includes classification, storage, retrieval, security and distribution of your documents. By doing this, you can get a sense of the organization's needs and how it handles its documents. Not all organizations handle documents the same way. For example, banking and finance firms have strict security issues to consider.
- 2. Locate information.** Where is the information that needs to be converted? Is it in microfilm, tapes, electronic media? By gathering data - such as the typical number of pages, their condition, size and weight, media types and handling and retention requirements - you can assess how long it will take to complete the conversion.
- 3. Structure and categorize.** Identify the optimal index schemes based on current and future methods of retrieval, page or file-level indexing needs, availability of existing index records, and the feasibility of optical or intelligent character recognition (OCR and ICR).
- 4. Outline a project plan.** After determining what needs to be converted, pick the best equipment for each process. The outline should include a determination of facilities, equipment, staffing, document tracking and methods required to port images into the system.
- 5. Conduct small-scale tests.** What if your plan needs adjustment? Don't just dive in; get your feet wet to ensure that procedures are valid and meet quality standards.

Greg Bartels is the President of Image Processing Systems, Inc. an image conversion company (www.imageserv.com).