

— Capture Prep Checklist —



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# The Checklist

*The intent of this document is to assist you in the process of gathering the appropriate information when researching a capture or document management solution.*

- Ensure you have the basic tools to capture information: a dedicated document scanner or multifunction device that can scan to SMB or FTP in TIF or PDF format.
- Determine capture software to use and whether it needs to be client, server or client/server based.
- How many people will be contributing in the scanning process?
- Determine the scope of your effort. We recommend starting with just incoming paper, then you can scan the rest of your file cabinets.
- Decide how you want to organize your paperless data. In a nested folder structure like on your PC or document management system?
- Consider options for securing and protecting your paperless data.
- How will you Shred and recycle your unused paper?
- What is the estimated Volume you anticipate scanning per year?
- How many capture stations would be utilized at one time?
- Who will be scanning the documents (an intern or existing employees)?
- How far back does your organization anticipate scanning? Are there any legal requirements on how far back documents need to be kept?
- Do you have an existing Sharepoint site that you would like to scan to?

- Are there bar codes or QR codes on documents within your current process?
- Measure and list applications you use to run your business (Accounting, Sales tracking, etc.)
- Are you considering scanning your documents into the cloud or onsite?
- Do you use forms in your workflow? If not, find out if it's a requirement.
- What are your compliancy requirements? Would you pass an audit today in scan tracking?
- Do you need to input paper documents into an electronic workflow?
- Is highlighting and redacting to hide sensitive information a requirement?
- Find out how users create PDF and PDF/A documents today. Can everyone in your organization create, combine and edit a PDF, PDF/A documents?
- Think about what your top 3-5 paper intensive work flows are and document them, follow the paper from beginning to end.
- Does your IT department have time and are willing to help with a trial/POC if needed?
- Determine a budget allowance and cycle to determine timelines for the implementation of the software solution.
- Consider if Mac or PC's will need to utilize the scanning software.
- Is a "Web Based" solutions a preference or software installed on computers?