



Pricing Out Your Scanning Project **Record Nations | @RecordNations**



Executive Summary

Document Scanning is changing the way companies manage and control their documents. It provides an easy-to-use system for maintaining virtually every aspect of document management, from human resources files to business files and contracts that are critical to any company.

Simply put, document scanning is converting hard-copy documents to digital format so they can be modified, shared, and distributed through a proprietary or centralized system. A document scanning company has high quality, high-resolution document scanning equipment that provides reliable digital reproductions of any kind.

These companies can scan all kinds of documents, drawings, or schematics quickly- and then apply post-production options like indexing, optical character recognition, and redaction services to ensure your digitized documents are easy to find and edit.

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Introduction

Determining that you need to do scanning is one thing. Figuring out how to do it- and how much it costs- can be a little more difficult.

You can always hire a professional document management company to handle the project for you, or you can choose to create a process in-house. There are advantages and disadvantages to both choices.



Regardless of which option you choose, you'll have several tasks to complete and a lot of choices that you have to make to prepare your company for electronic documents- and this article is designed to help you through that process.

We'll take you through all the different aspects you should consider when pricing out a scanning project, including how the process works, what steps you need to take to prepare your documents to be scanned, how and where you should store your documents after they're converted, and what do with your documents after the project is complete.

What Industries Use Document Scanning Regularly?

Although any business can go paperless, there are a lot of companies in specific industries that literally have mountains of paperwork that they have to maintain- sometimes on a daily basis.

The more hard-copy documents you have to maintain, the more likely you'll see a huge increase in productivity and efficiency, and a tremendous reduction in lost and duplicated documents and the risk of a low-tech hack or data breach by switching to paperless.

These are just a few of the industries we service, but they maintain thousands of records a year:

Medical Practices – From single practitioners to hospitals, new laws and legal requirements have made digital document scanning mandatory for the healthcare industry.

Legal Firms – Minimize the time it takes to find critical files and eliminate the chance of an important client file being lost or misfiled. Document scanning companies can even scan on site if required at the offices of your client, or for opposing counsel.

Accounting Firms – Maintaining client files can become costly- going paperless gives accounting firms access to entire files quickly, and optical character recognition and indexing ensures any file can be found easily in the event of an audit.

Architecture Firms – Large format scanners can handle engineering drawings and blueprints, eliminating the need to maintain a hard copy library.

Government Offices – Government offices have to store documents long-term. Reduce the costs of records storage and even the need to lease additional space for records that need to be stored.

No matter what type of industry you're in, the more you streamline your processes, the easier it will be to run your business. That's where document scanning can give you a tremendous advantage for your business.

Types of Documents You Should Consider Scanning, Storing, or Destroying

To start, you need to organize your thoughts- and your documents. Although there are certain files that need to be kept long-term for legal reasons, there's also several other types of documents that you should keep permanently or until you need them short-term.



Here's a list of some of the more common types of records and documents that businesses need to maintain and keep on hand. Since you need to access these documents regularly, these documents are some of the most important ones to consider converting to digital format.

Tax Records

The Internal Revenue Service mandates that business tax records need to be kept for at least three years- but if you're not reporting part of your income or carrying

over a loss or a gain in your business, you need to hold on to them for three years **after** everything has been reported.

Many experts say that it's wise to keep your filed tax returns permanently. Any tax records related to employees need to be kept for seven years after you have paid all taxes due on them.

Previous year's tax records could be stored offsite in paper form after the tax year is complete and you have filed your taxes- you only need to have the current year's documents on hand. Check with your accountant to clarify your specific situation.

Employee Records

All employee records should be kept for at least seven years, especially any documentation that includes taxes you paid on their behalf as part of their paycheck. Every employee should also have a file that documents annual reviews and any discipline meetings you held with them to protect you in the event of a lawsuit or other issue.

Any active employee should have a digital or hard copy record in the office, but you also need to maintain files for employees who have quit or retired in the last seven years.

Client Records

Client records are critical to your business- you need to set up a reliable way to maintain client or customer records. It's important to store the customer files and information in a system that is easy to use and pull up detailed information quickly. Scanning these files is highly recommended.

Digital systems allow you to set up reminders when a client places a large order, when an account goes inactive, and to track billing and invoicing. Thousands of companies use a CRM that interfaces with their electronic document management system to connect their departments and ensure superior customer service.

Setting up a system that allows you to flag files that need to be scanned or stored is an excellent addition to your document management plan. Depending on the type of business that you run, you may want to store client records after three years of inactivity. You should also store any copies of contracts, mortgages, and deeds.

Other Items You should keep in the Office

Besides the items listed above- you should also keep these items on hand in your office (or have a digital version of them):

- Information on your current insurance policies for the business
- Active loans
- The current year's bank statements and your current accounting system
- The current years' time cards for each employee on hand
- Any document, form or file that you access daily

This is just a short list of the documents that we recommend- if you want more information on the specific retention times for business documents, [please click on this link!](#)

The Benefits of Document Scanning

Why should you migrate to a digital office? Is it really worth it? The short answer is yes- but you're probably expecting us to say that.

There are plenty of advantages to going paperless- and our customers and our clients have passed along some of the best reasons that your company should consider (or start) scanning your documents and using an electronic document management system today:



It Prepares You for Future Digital Formats

Before digital documents were mainstream, converting from one storage medium to another was a tremendous undertaking. Although the new storage systems had advantages, the migration was a hassle- and there was a good chance that something better would replace it in the near future.

This is why so many companies rely on hard-copy document management now. Most digital formats can now be updated quickly and easily, eliminating the costly process of converting from one storage medium to another.

Increased Security



With the enactment of several privacy laws including HIPAA and FACTA that require businesses to protect personally identifiable information for employees, customers and more, security has taken the forefront for companies nationwide. Digital documents provide better access control.

You can focus security all the way down to the document level and access can be changed instantly as job functions change or employees leave. You can also enable encryption and high-level security on any digital storage device, limiting the chance of a digital data breach, and ensuring that critical business documents and personal information are protected.

Collaborate More Efficiently

Document scanning allows teams and remote workers to work on projects across geographic areas simultaneously. Company records can be accessed, modified, and uploaded by anyone in the office, which puts valuable information at your employees' fingertips whenever they need it.

Make it Easier to Distribute and Retrieve Documents



Eliminate the need to find a document, make a copy, and send it through the mail or FedEx with document scanning.

Digital versions of important documents allow remote employees and partners to have access to documents instantly with an email or access to your EDMS.

Increase Efficiency

Your employees spend time looking for records every single day. Document scanning eliminates the frustration and the time it takes to find a document.

Once you have your document scanned and indexed digitally, you can find them with a quick keyword search.

Electronic documents also reduce the chance of duplication and accidentally sending out old versions of critical documents to clients- almost every EDMS gives you complete version control, and ensures that the most recent version of any document is easy to find and current.

Save Space in your office

When you run a busy office, it can already be stressful. If you throw in a bunch of paperwork and clutter, it decreases workflow and makes everything harder to manage.

An average filing cabinet uses 15-20 square feet in your office- if you're cramped for space, scanning your documents is a great way to optimize your office and streamline your processes.



As you can see, there are plenty of reasons to make the leap to a paperless office. Next, we want to discuss some of the things you need to do to prepare for your scanning project.

Whether you choose to do it yourself or you are looking for a professional scanning company to help you scan your documents, planning ahead to ensure your documents and your employees are prepared is the next logical step in figuring out if document scanning is the right choice for your business.

What type of scanning service is best for my business?

One of the most important steps in migrating to a paperless office is to determine what type of document scanning system you want to implement. Even though the cost per page can be pennies when scanning tens of thousands of documents, scanning every file you have in your massive file room might be a bit cost prohibitive,

Here are some of the choices that you can consider to determine the best option for your company.

Option 1: Scan Everything

The first thought when a company considers digitizing their documents is to scan everything within reach. It's a catchall option, and guarantees that there are no critical documents that could be missed. While this option puts all your documents in one place, even 5 years' worth of filed documents can be thousands of dollars. If your business has backlogs dating back to the 50's, it might not be the most cost-effective way to utilize a paperless office.

Option 2: Scan on Demand

Every business has a series of documents that they use regularly- it could be forms, HR files, or even specific documents that need to be retained on a regular basis. On the other hand, there are some documents that businesses need to hang on to, but are never touched after they're filed.

Sometimes it's easy to tell which one is which- but if you're not sure, you can utilize a scan on demand option. This is particularly useful if you utilize an off-site storage facility.

All your documents are retained and stored offsite, but you can request that any document (or series of documents) be scanned in when you need them to be. Over time, all of your regularly used documents are digitized, and documents you no longer need to retain are shredded once they pass their designated retention time.

Option 3: Day Forward Scanning

Day Forward scanning is a cost-effective way to manage your records and clearly define what you're going to scan, and what you're going to archive.

It gives you the flexibility to access paper files and transition between your old document management systems to a new, more efficient, and easier to use electronic document management system.

The definition of this strategy is pretty simple- all you do is pick a date in the near future where you will no longer keep paper records.

Moving forward from that date, all records will be scanned indexed, stored and managed digitally to make your office more efficient, your records more accessible, and decrease the costs of paper records.

After you have made the transition, you can utilize several different options for all the paper records you still have hanging around the office taking up space. You might want to scan your older files if you need to access them at a future date, or you can store them off-site in a secure records management facility.

There are also hybrid options where you can scan and store documents in any way you choose that fits your business best- but realize that customized systems where there's a possibility of duplication or security issues can negatively affect your business. Choose wisely, and stick with it.



Determining How Many Documents You Need To Scan

Once you figure out the process you want to use to scan your documents and the different files you need to keep on hand, the next step is estimating the amount of documents in your scanning project.

Since every document management company offers a per-page scanning price, having a good estimate of what you have to scan will help you get accurate quotes for your project.

There are two main ways to get an approximate count of the number of pages you have to scan- by the number of banker's boxes or file boxes you have, or how many sheets of paper per inch you have in a filing cabinet or on a shelf.

Here's a quick way to get the information you need.

Bankers Boxes

A standard banker/copy box is 12.5"W x 15.5"D x 10.5"H. Depending on the type of paper and the amount of file folders that you have in each box, you can fit approximately 2000 to 2500 sheets of paper.

Large File Boxes

A large file box is 15"W x 24"D x 10.5"H. Depending on the type of paper and the amount of file folders that you have in each box, you can fit approximately 4000 to 4500 sheets of paper.

Documents per Inch on a Shelf or in a Filing Cabinet

The number of documents per inch on a shelf or in a filing cabinet really depends on how tightly packed the papers are. On average, you can figure that you'll have around 150 to 200 sheets per inch of space on your shelf or in your cabinet.

To figure out how many boxes of documents you have, think about this:



If your documents aren't packed tightly and you have 150 sheets per inch, then you need one standard banker's box for every 13" to 16" of space on your shelves (round it down to a foot to make it easier).

If you can't fit one more piece of paper on your shelf, you're probably closer to 200 sheets per inch. In that case, you'll need one standard banker's box for every 10" to 12" of space on your shelves.

Although these are just estimates, it will give you an idea of how many boxes you have, or approximately how many actual documents that you might need to scan.

Now, let's look at some of the factors that affect the pricing of your scanning project.

Pricing Out Your Scanning Project

Now that you have selected the type of document scanning service that works best for your business and have figured out the approximate number of documents that you would like to scan, the next step is to determine all the variables that could affect your quote from a scanning professional.



A typical scanning job averages around 7-12 cents per page, but the pricing of your project will vary according to exactly what you are looking to do. Here are some additional considerations that factor in to the quote for your scanning project.

Are your Documents Single-Sided or Double-Sided?

Double-sided paperwork adds some complexity to the project- A standard letter file box full of paperwork that is double sided increases one box of documents from 2,700 pages to 5,400 pages.

How much prep work is involved?

Production scanners are designed to auto feed letter and legal sized documents. They are high speed and scan up to 10,000 pages an hour- but that requires several steps to ensure that the process is seamless, and that you capture a high-quality image of the document.

Document scanning companies do offer prep work, which includes:

- The process of removing all staples and bindings.
- Taping odd-sized documents to standard paper.

- Separating out pictures and color documents (they must be handled separately).
- Re-assembly of your documents after they are scanned.
- Any other service you might need

Prep work factors into the end-cost of your project- by determining what work is required and what services you would like the document scanning company to provide up front, you can eliminate the chance of your project cost creeping due to unforeseen prep work and additional cost.

We will discuss some things your company can do to eliminate some of these costs in our discussion of the lead-time of your project later on in this document.

Do you have lots of documents to scan?



The price of your scanning project is going to change according to the amount of documents that need to be scanned. Document scanning companies usually offer volume discounts based on the size of the project.

A few boxes of documents will have a higher charge per page than a million pages- so if you have a small volume of documents, but don't have an urgent need to scan them, it might be beneficial to wait until you have a higher volume of documents to optimize the cost per page.

Where do you want to have the project completed?

Determining where you want your documents scanned is a major factor in the cost of your project. If you need to witness the process, or don't want your hard-copy documents to leave the site, a scanning company can come to your location and scan your documents onsite.

This ensures that your records are secure, and scanning onsite will allow you to integrate into your electronic document management systems faster.

That doesn't mean that sending your documents off-site to be scanned isn't secure- the scanning company can provide secure, lockable containers, or you can provide your own containers and give the company access at their facility.

Dropping off or sending your documents to the scanning company directly will result in significant savings over on-site scanning.

When Do You Want to Have the Project Completed?

Time is always a factor in any project- the more quickly you want your scanning project completed, there's a good chance that it will increase the overall cost of the project.



You should get an accurate estimate from your scanning provider on how long the project will take- they will factor in any prep work required, any additional requirements for your project (OCR, Redaction, Indexing, etc.), and the time it will take to re-assemble the documents.

The larger the project, the longer it will take. Be sure to provide an order of priority for documents that you use regularly. In most cases, you should be able to access your digitally scanned documents very quickly- sometimes on the day that they're scanned- but that hinges on the type of digital storage and document management system you have in place.

All these factors will help provide you with a very accurate quote for your project. The more information you gather and the more prep work you prepare for, you'll reduce the chance of a quote that's higher than you expected.

When you have a quote in hand and are ready to proceed, the next thing to consider is the lead-time it will take to get your project off the ground.

Determining the Lead Time for Your Scanning Project



The lead-time for the project genuinely depends on the type of service that you're requesting.

When you choose the proper contractor for your project, be sure to ask about the lead-time for the project, and the approximate time it will take until they can start the project.

The lead-time for a scanning project varies depending on what steps you have taken (or want to take) to add digital documents to your current workflow and document management plan.

The more prepared your company is, the less time it will take to start the project. If you follow the steps we've provided so far, you should be in great shape to start your project quickly.

Here are some of the things your company can do to prepare for a document scanning project:

1. Sort through your documents and remove staples, paper clips, tape, or anything that might cause sheets to stick together. Making sure that all pages are separate speeds up the process and ensures no pages are missed.
2. Be very careful how you use tape. Tape should only be used for items like plane tickets, receipts, business cards, etc., Tape each of these items evenly and straight in the middle of a sheet of paper- and use one side of a sheet of paper. Taping on two sides may result in a critical page being missed or make the page difficult to scan.
3. Straighten out any folds in pages. Any information in a folded section will not be scanned, so it's critical to ensure that all parts of each page are visible. You should also straighten out bent corners.
4. Arrange all documents in the order that you plan to have them scanned in to streamline the process and make the entire conversion go a little faster. Making a plan ahead of time is a lot easier than trying to do it after you start your scanning project- and it will help with the indexing of your digital files too.

Storing and Using Your Documents Once They're Scanned

Once your documents are scanned, you need a way to access them and store them.

Before the tremendous growth of online storage, converted documents were stored on disks, servers, or external hard drives.

Today, companies utilize Electronic Document Management Systems, or EDMS, which make the documents easier to find, and gives the ability to manage who has access to particular information. An EDMS provides improved workflow of information throughout an entire organization.



EDMS are traditionally a software platform that acts as a portal for all the documents in an organization. Electronic document management can be purchased as software and used on a company server or used as a “software service” with cloud computing.

Benefits of an EDMS

If you're considering scanning your documents, you might be using an EDMS already, or have selected a system that works best for your business. If not, here are some basic document management features that every EDMS should provide.

Reduction of Labor Costs

An EDMS reduces the labor required to manage and handle the documents. All scanned documents are available to every employee on their computer instantly, and finding a document takes seconds with a simple keyword search.

This reduces the labor costs associated with tracking a file down in an on-site file storage room, which quickly recoups the cost of implementing this system through improved efficiency and reduced labor costs.

Legal Compliance

An EDMS allows for the quick retrieval of all required documents if subpoenaed—digital documents are aged and marked for destruction when they reach the end of their lifespan.

It also includes security procedures and the ability to set access to a user level. Employees can only get access to what they need for their job and mass downloads are strictly controlled.

No more Onsite Document Management Problems & Remote Access To Your Documents

Using document scanning for company records to an EDMS reduces or eliminates the need for onsite storage space. Company documents and records are also easier to share for employees that are working remotely or are constantly on the road. Everything they might need is available in real time.

Key Features of an Effective EDMS

An effective EDMS has a variety of features and choices that need to be considered.

Here are some of the main requirements that we recommend (and that should be included) for your Electronic Document Management System:



1. The ability to store electronic records and access them quickly
2. Access control to a user level to increase security and decrease liability
3. A simple system for adding or scanning in new documents and records
4. Integration with other existing company software packages
5. Version control of the documents with access logs to prevent redundancy and mistakes
6. Integration with the company document management policy and known procedures.
7. An easy to use backup solution that's simple to maintain

Beyond the basic features, they have many other options that will depend on the individual company, industry, and the goals of the conversion.

1. Conversion of images to text or optical character recognition (OCR)
2. Conversion and integration of multiple file formats
3. Website portals
4. Enhanced search capabilities
5. Ability to export into multiple file formats.

Choose your EDMS Wisely...

Before choosing an EDMS vendor, it's important to take the time to look at several options. It is useful to practice on each one of the packages.

Don't just watch the sales person do a demonstration- set up a practice database and perform the functions that each employee will have to perform.

Be sure to check to make sure you can export your documents in the future. This will prevent the company from being "locked in" to a single vendor if needs change.

Once you have selected an EDMS system for your company, you need to have a place to install it. You could utilize your internal network or server, but one of the more useful and powerful options to utilize your EDMS and store your files is through Cloud Storage.

Advantages of Cloud Storage

Cloud storage has lots of advantages for your business. Not only will it integrate seamlessly with any EDMS system.

It will give you the ability to store massive amount of information remotely, which allows you to protect your information, backup your files regularly, and access your data whenever you need to.



Here are some of the advantages of utilizing cloud storage with your existing or new EDMS.

Remote Access from Anywhere

As long as you have Internet access, you will have access to the files on your cloud server. Since cloud storage isn't device-oriented, you can access files through a smart phone, notebook, tablet, laptop, or any Internet-enabled electronic device.

This makes virtual commutes easy, and allows people to have more freedom to connect with clients and their family. It also gives you access in a pinch when you forget that critical document or need access to a presentation that was corrupted on your laptop.

External Backup

Another advantage is the fact that an online data backup service is an *external* backup of your system and files. Your data is protected from issues and natural disasters that in other instances would be catastrophic.

Cost



An online data backup service is an affordable way to install a centralized network to share files and back up your system.

It's also a cost-effective way to back up large amounts of data instead of buying an expensive network server dedicated solely to data storage- and the company or labor to maintain it.

Cloud services allow a company to subscribe to an online service for a nominal fee for the entire business or per user. Cost is variable depending on the capacity and the requirements that your business requires.

Customization

One of the biggest changes in cloud services over the years is the ability to customize the service you need to your business. Even the more inexpensive cloud service providers offer you a level of customization that is more sophisticated than traditional storage and networking systems. Cloud storage systems are software driven and usually require a small investment in hardware or software.

Ease of Use

Usability is one of the biggest changes that cloud storage will bring to your business. Almost every solution is universal to Mac and PC, and has the 'drag and drop' option, so you can take any file and easily send it to your cloud storage drive.

The interfaces are also easier to understand and manage, removing some of the burden of extensive training and understanding of how your system works.

They Can Grow With You

Scalable services are one of the most overlooked advantages of cloud storage and cloud services.

It used to be tremendously expensive for any growing business to expand their capacity and ability to take on more clients and more employees.

Now, with a series of phone calls and some troubleshooting, you can expand the capabilities of the business faster- but not necessarily easier. You have to be sure that you find a solution that works with all your existing systems, processes, and procedures.

That way, you won't have a less painful migration to the cloud, and you can systematically fix your bandwidth issues without having to expense tens of thousands of dollars for equipment. You can also grow as you go- you don't have to worry about expanding to support future growth.

Integrating a cloud storage service with an EDMS will create a flexible, powerful, easy-to-use system for your newly scanned digital files.



Conclusion

Starting a scanning project seems like a simple task- but finding the right company to do your scanning for you is just one piece of the puzzle. Proper research and preparation will make the transition to a paperless office seamless, and you'll see the benefits of a digital document management system instantly!

Our goal for this article is to help provide you with the reasons why you should consider migrating to electronic documents, and provide you some tips on how to get your scanning project off on the right foot. These considerations will help you get an accurate quote for your project, reduce the lead time and the total time it will take to complete your project, and ensure that you select the right system to store and access your files.

Document scanning, cloud storage, and Electronic Document Management Systems have changed the face of document management forever. The sooner you take the leap to a digitized office, the sooner you'll see the tremendous advantages that are right in front of you.

Additional Resources

- **How Day Forward Scanning Can Help Your Company**
Determining a starting point for your company to move to paperless can be challenging. Day Forward Scanning can help you bridge the gap when transitioning from a paper filing system to a paperless, digital document management system.
- **Why Scanning and Archiving Documents is Important for Businesses**
Paperless offices are one of the more efficient ways to manage your documents. This article explains how you can save time and avoid losing documents by scanning your paper documents.
- **Document Scanning Can Save Your Small Business Money**
Integrating document scanning into your current document management plan can save your company in many ways. Learn how document scanning services can help optimize your workflow.
- **Prevent Corporate Brain Drain with Document Scanning**
Employee turnover can be a big problem in larger companies. Files from former employees get lost in the transfer of information, and important documents are lost in the shuffle. Learn how document scanning can help prevent some of these issues in your company.
- **Why Paperless Office Settings are Becoming More Common**
With the increase in efficiency and quality of document scanning and digital storage, businesses are migrating towards paperless offices more and more. Learn about some of the advantages and disadvantages of a paperless office, along with some additional opinions on this intriguing subject.
- **How Document Scanning Can Clean Up Old Files**
Does your office have to deal with an annual, quarterly, or monthly purge to clean up old files, eliminate duplicates, and keep things in your filing room organized? Learn how document scanning can help you minimize (or eliminate) this process for good.

For More Information

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