



# So You Think You Want To Digitize



The trend of local governments digitalizing public records has a number of contributing factors. Advances in technology, increased demand for access through electronic means, and a general desire to reduce the volume of paper records stored in offices or at off-site locations all play a role in that decision. But as with all projects, it is important to evaluate a number of factors **before** you begin. Carefully thinking through the components of a scanning project will go a long way towards ensuring a successful and useful outcome. This document is intended to help you consider how the digitization fits into your unit's records management and technology plans; all the while maintaining compliance with retention schedules, statutes, and ordinances. Asking the following questions will help determine if a digitization project is worth your time, effort, and money.

## 1) What is your purpose?

- How are the digitized materials going to be used and what are the benefits of having the records in digital format?
- Is there a demand for the content of these records in digital format?
- What are the goals of your project/what do you hope to accomplish?
  - To increase access to the records or decrease the handling of fragile originals (preservation)? Or both?
  - To reduce the quantity of your paper files?
  - To provide access to the records online to the public?
  - To provide access to the records to staff in remote locations?
- Will the digital records replace existing paper records?
  - If "Yes" - do you plan on destroying the paper records? Make sure to notify WHS before destruction.
  - If "No" - have you determined whether the paper or digital version will be the official public record?
  - Depending on your answer above, would you need to update a records schedule in some way?
- Will the digitized records be made available online and if so, do you have a plan for that?

## 2) How do the records retention schedules affect your digitization plans?

- Have the records met their required retention period specified by record schedule or ordinance? Are they ready for destruction or transfer to the State Archives at the Wisconsin Historical Society?
- Are the records slated to be destroyed or transferred within the next 10 years? If so, it may not make sense to take the time or resources to scan them.
- If the records are long-term or permanent, is it more cost effective to store them in their current format?
- Is there an essential business reason/demand to digitize items that are not determined to be unit records?

## 3) How is the project being funded?

- Have you secured funding for the term of the scanning project?
- What parts of the project will your funding support? (physical resources, hardware, software, networked access, personnel, dedicated space, vendor services, etc.)
- Is there a long-term commitment to cover ongoing, post-scanning costs for preserving and maintaining access to the digitized items?

#### 4) How will you perform the actual digitization?

- Where will the digitization take place--in a central location or off-site? If off-site, does the site meet the security needs for the content you are digitizing and the hardware/software used in the process?
- Will the project be done with in-house staff or will you contract with a vendor?
- What is the scanned image quality you are planning on for this project and do those specifications meet the recommended best practices for access and preservation or potential litigation requirements?
- Who will perform the quality control and what is your procedure for determining an "acceptable image"?
- Which file format will you use for the scanned images and does that format meet the recommended best practices for access and preservation? Keep in mind it must be clear on both a computer screen and printed out on paper.
- Will you create multiple variations of the image, such as thumbnails or user copies, of the master file for viewing and downloading?
- What are the limitations of your hardware and software (file size, file format standards, proprietary file formats, interoperability, scanner limitations, etc.)?

#### 5) How will you locate and access the scanned records?

- What type of description already exists for the records, and at what level (item level or collection level)?
- What metadata do you plan to use to find and locate the records?
- Will the metadata be able to track any derivative files (thumbnails, user copies) created from the master record?
- If the records will eventually be transferred, are you applying minimum metadata standards required by the Wisconsin Historical Society?
- Have you determined a consistent naming convention / file organizational structure for the files that meets best practice standards?

#### 6) How are you planning to maintain the records into the future?

- How do you plan to store the master files and where?
  - Will you be creating copies of the files for access and preservation?
  - How many copies of each of these will you be storing and where? Ideally you need at least 2 copies of your files and preferably in geographically disperse locations.
- Have you consulted with your IT department or your office considered current and future storage needs?
  - What is your current digital storage capability?
  - Do you have enough storage space available to begin your project?
- What kind of a backup procedure do you have in place in case of hardware/software failure?
- Does your IT department or your office have a documented plan to monitor formats and ensure they are migrated appropriately over time as technology changes?
- Do you have funding in place for future storage migration and refreshment?

#### **Resources referenced for this document**

NY, South Central Regional Library Council. *Questions to Ask Before Starting a Digitization Project*. n.d.  
<https://sclrc.org/Questions-to-Ask-Before-Starting-a-Digitization-Project> (accessed May 2017)