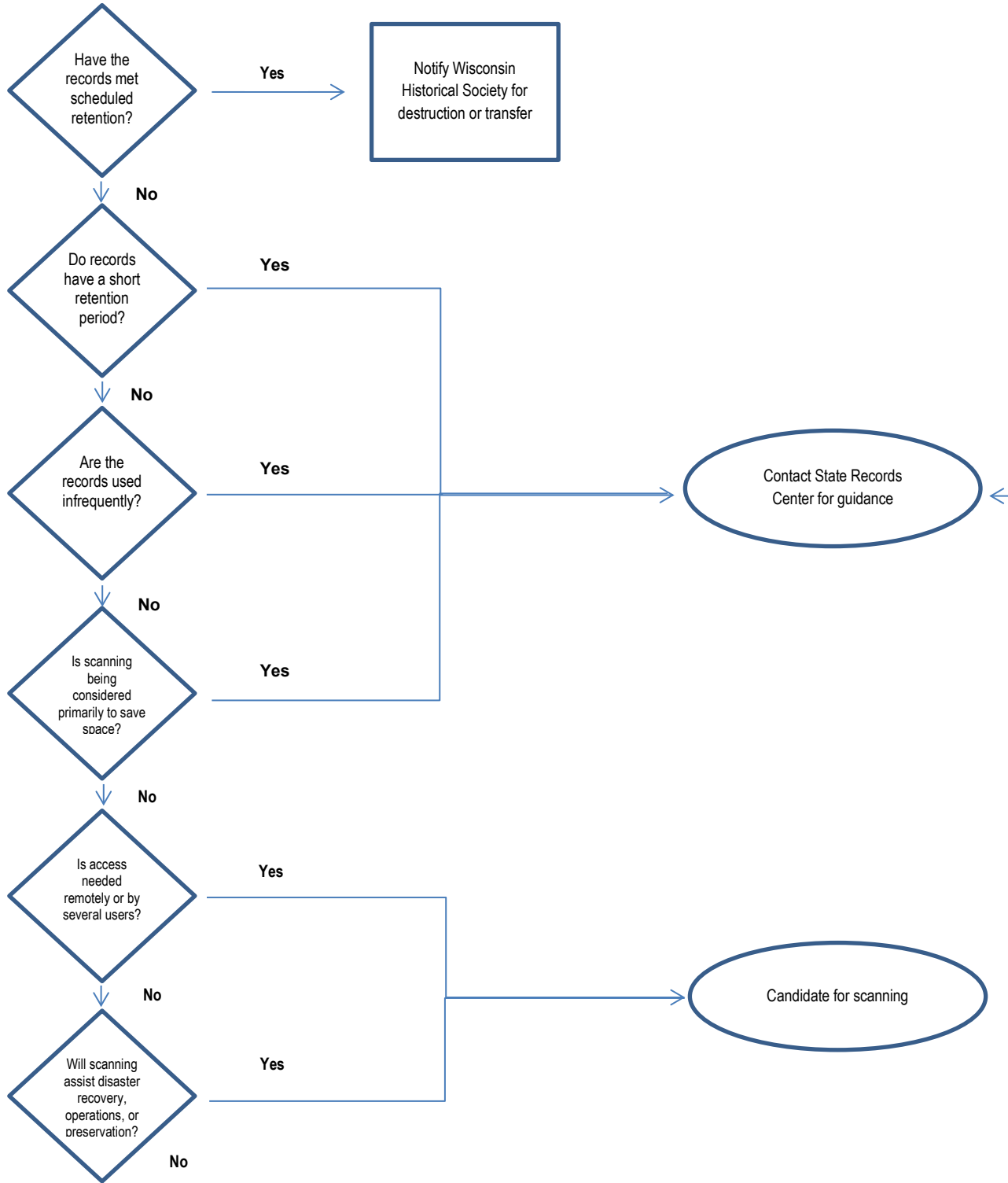




# Scanning Decision Tree



### **Have the records met their scheduled retention time?**

Before digitizing any records, evaluate them to see if they are beyond their required retention period and can be destroyed. If they are out of retention, identify them for destruction and do not scan. Notify the Wisconsin Historical Society as required by state statutes before destroying any public records. The Wisconsin Historical Society will reply with a decision on whether the records can be destroyed or will be transferred. Consult your corresponding local government records schedules for information on which particular records have been granted waivers for notification.

### **Do the records have a short retention period?**

Generally, it is not cost effective to scan records with short retention periods if the intention is to replace the paper record with a digital copy. The costs of equipment, scanning, metadata creation, quality control and storage may actually be higher than the cost of storing paper records for ten (or less) years. There may be some cost savings if you are creating lower-resolution digital user-copies for frequently requested items your unit wishes to post on a website.

### **Are the records used infrequently?**

If records are accessed only a few times a year, it is usually not cost effective to scan them. Proper records management of the paper will likely be a more effective strategy. If space is a concern, contact the State Records Center for guidance and to verify if storing records at an offsite storage facility is a more practical alternative.

### **Are records being scanned to save space?**

While the business decision to scan records and dispose of the paper to “save space” is often used, the costs associated with scanning and the long term storage and maintenance of electronic records may very well be higher than the cost of properly managing and storing records in paper format. Contact the State Records Center for guidance and to verify if offsite storage is a more practical alternative once the paper records have been reviewed.

### **Is remote access, or access by multiple people simultaneously, needed?**

Electronic access can be the best method for providing access to several people simultaneously and/or to remote users. It can also allow for increased collaboration among staff. The costs associated with increased productivity may outweigh the costs to scan, add metadata, and create a search interface.

### **Will scanning assist with operations, disaster recovery, and/or preservation?**

Before beginning a scanning project, make sure it will benefit the organization in a tangible way. Will the project result in faster or more accurate service to customers? Does the proposed scanning project play a role in disaster recovery planning? Are records being scanned for preservation purposes? If the answers to these questions are generally “yes” the costs connected with scanning and indexing records may be outweighed or justified by these factors.

### **For additional help and information**

#### **State Records Center**

The State Records Center (SRC) is a secure, low cost facility that offers state agencies and local units of government (near Madison, WI) off-site control over semi-active and inactive records. More information is available on their website.

#### **Wisconsin Historical Society**

[govarc@wisconsinhistory.org](mailto:govarc@wisconsinhistory.org)

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

Illinois Secretary of State. *Should I Scan?*. 2013. [https://www.cyberdriveillinois.com/departments/archives/records\\_management/scanningtree.pdf](https://www.cyberdriveillinois.com/departments/archives/records_management/scanningtree.pdf) (accessed June 2017).