



KONICA MINOLTA



DIGITIZING PAPER

BEST PRACTICES

You may be struggling with paper files and boxes of records stored on-site or off-site as you address the challenge of easily accessing information from anywhere your staff is working. Paper takes up valuable office space, searching through paper takes up unnecessary time and off-site storage is an additional cost. You are probably asking yourself:

DO WE NEED TO KEEP EVERYTHING, AND DOES IT ALL NEED TO BE PAPER?

Sometimes, you know what you want in the future, but you don't know how to get started. Konica Minolta's Business Process Outsourcing (BPO) team is here to help you do just that. We guide you through a process to consider the documents' lifecycle before any scanning and indexing is done. Unlike some organizations who encourage you to scan everything [because it's good for them], we encourage you to not scan everything [because that's not good for you.] Our goal is to work with you to build a plan that makes sense.

WHAT DO I DO TO GET STARTED?

Simply stating that you have 1000 boxes to scan without knowing the nature of the documents in those boxes, can be costly and counterproductive; our process, helps you avoid wasting time and money. This process overview gives you a high-level look at the key points to consider for your project. By the time you get to step four — we will be scanning and capturing documents based on your level of utilization for each document type — which could vary by department.

1 PURGE
Shred what you clearly do not need to keep

2 ASSESS
Assess what remains and divide into groups

3 RETENTION PLANNING
Tackle the elephant in each department

4 EXECUTION
Build your priority timeline and budget

1 - PURGE

- Identify where you have ALL of your documents, records, and content to ensure you can execute a complete review.
- Whether you have a Records Retention Plan or not, you will know what material is just junk that you no longer need to keep. Purge the junk first to reduce your paper footprint.
- Complete this initial step for all departments for a thorough organization-wide program.

2 - ASSESS

The purpose of this step is to discover what needs to remain in box storage (if anything), and what needs to be scanned. Defining the filters will ensure that you can carry out the next step more easily. We have Certified Document Imaging Architechs™ to help you with this step.

- Identify what types of content you have.
- Note the timeline to keep each of those different content/document types.
- Review your compliance guidelines because document retention rules may be vastly different from other parts of the business.
- Determine if there are obsolete document types for the “really old stuff”.
- How far back to you want to go?

3 - RETENTION PLANNING

- Tackle what remains and separate into “buckets” based on utilization (high touch, medium touch and low touch). This will give you options.
 - Low touch – does it need to be searchable or will box storage do?
 - Medium touch – tabs in a folder?
 - High touch – scanned, OCR & indexed for searchability.
- Define the lifecycle of the document type – then the rules for retention will be clear.
- Create a catalogue based on utilization and build the plan for what to do with your paper files now and your go-forward strategy.

4 - EXECUTION

Now that you know what you have, what rules you must follow for each document type, what needs the highest level of scan/search based on frequency of use and options for everything else, we can mutually create your digitization plan to determine the necessary budget.

This will enable you to see the cost and tweak for more or less indexing. You make the decisions to keep the costs down and accomplish what is critical for your needs.

- Expect a prioritized timeline for higher value document types.
- Confirm the demarcation line to tidying-up paper files.
- Embrace a go-forward policy for your paper and/or digital documents.

At Konica Minolta, we take the time to make sure we can clean up your paper files with the precision necessary to meet your needs. Our goal is to help you digitize the necessary backlog and build a strategy to prevent future accumulation

Ready to transform your paper records into a streamlined, digital solution?

CONTACT US TODAY TO GET STARTED!

For complete information on Konica Minolta products and solutions, please visit: [CountOnKonicaMinolta.com](https://www.CountOnKonicaMinolta.com)

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KONICA MINOLTA BUSINESS SOLUTIONS U.S.A., INC.
100 Williams Drive, Ramsey, New Jersey 07446

[CountOnKonicaMinolta.com](https://www.CountOnKonicaMinolta.com)



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