

# DOCUMENT IMAGING PRACTICES CHECKLIST



Use this guide to identify where your organization is succeeding in its digital transformation and where there are opportunities to further align your imaging with long-term operational excellence. Put a checkmark next to each item in place within your organization. The more checkmarks, the closer your organization is to a fully optimized, search-ready digital foundation that supports seamless operations and long-term compliance.

## INTAKE AND CAPTURE

**Goal:** *Capturing information at the speed of business.*

- Documents are captured digitally at the point of entry (mailroom, front desk, field).
- Digitization workflows and scanning responsibilities are clearly defined for all teams.
- Information is digitized before it enters internal approval or processing routes.

**Notes:**

## QUALITY AND SEARCHABILITY

**Goal:** *Creating high-value, usable digital assets.*

- Scans are consistently captured in high-resolution, industry-standard formats.
- Full-text searchability (OCR) is applied to all records to ensure fast retrieval.
- Quality assurance steps are integrated to ensure every scan is complete and legible.
- Indexing and categorization are verified at the time of capture for maximum accuracy.

**Notes:**

## METADATA AND STRUCTURE

**Goal:** *Building a foundation for easy discovery.*

- Document types (invoices, contracts, etc.) are standardized across the organization.
- Key metadata (dates, ID numbers, subjects) is consistently applied to every record.
- Users can find documents instantly via search without needing to know specific filenames.
- Naming conventions are structured to ensure every record is unique and easy to identify.

**Notes:**

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## ACCESSIBILITY AND WORKFLOW

**Goal:** Empowering your team with the right information.

- Digital documents are seamlessly integrated into daily business processes and workflows.
- Access is role-based, ensuring the right people have the right information at the right time.
- The organization prioritizes central digital access over email attachments or shared drives.
- Multiple departments can securely collaborate on the same record simultaneously.

**Notes:**

## GOVERNANCE AND CONTINUITY

**Goal:** Ensuring long-term compliance and security.

- Retention and disposal policies are applied to digital records throughout their lifecycle.
- Audit trails are maintained to provide a clear history of document access and changes.
- A single source of truth exists to prevent the build-up of duplicate digital copies.
- There is a clear strategy in place for the long-term governance of digital records.

**Notes:**

## REFLECTION AND NEXT STEPS

**Checkmarks:** These are your organization's digital foundations.

**Opportunities:** Areas without checkmarks represent opportunities to improve operational speed, reduce manual effort, and better support future ECM goals.

**About 3SG Plus:** We help organizations standardize imaging practices and align digitization with long-term strategy, ensuring your digital records are usable, compliant, and ready for what's next.

**Ready to turn your scans into strategic assets? Contact 3SG Plus today to bridge the gap between simple digitization and a high-performing digital workplace.**

## CONTACT US

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