



Imaging Project Scoping Form

XBS Region/Location: _____ **Client Name:** _____

1. What kind of documents need to be imaged?
2. Number of boxes? What size? (send pics)
3. Number of filing cabinets and drawers? What size? (send pics)
4. Other storage containers? (send pics)
5. Are documents all 8.5x11? If not, what other sizes?
6. What types of files, folders, physical doc breaks (staples, clips) are present?
7. Approximately how many "files/folders" per box or drawer?
8. How much 2-sided (% of total)?
9. Is color scanning needed? What types of documents (% of total)?

10. Are there any large format drawings? Are they rolled or folded?

11. How do the files need to be named? Where is the data found?

12. Do the images need to be key word searchable (OCR)?

13. Method of file transfer for digital images?

External drive

DVD

Secure file link (upload)

14. Is a content management system in place, or being considered?

15. Will originals be returned or destroyed at project completion?

- Take an accurate count of all storage units, making sure to differentiate between various sizes or number of drawers, shelves, boxes, etc.
- Provide measurement or frame of reference for at least one drawer, shelf, box, etc. Be sure to include all size variations.