



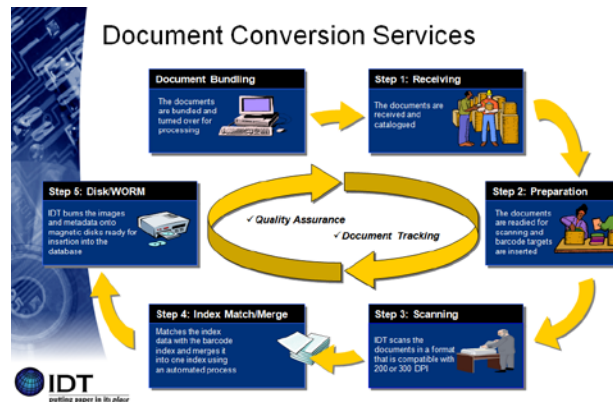
**IDT**  
putting paper in its place



## Frequently Asked Questions and Answers (FAQs)

### Q: What are Document Conversion Services?

**A:** Document Conversion Services are the process of converting your paper based documents into digital image files. Document Conversion Services are sometimes referred to as “document scanning or document imaging.” If your organization is looking to take its paper based documents and transform them into electronic images that are indexed, stored, and easily retrieved via a web-browser, that is where IDT’s Conversion Services can help! We can help free you from the tedious manual tasks, excessive costs and space requirements of manual based, paper management systems.



### Q: Who can benefit from Document Conversion Services?

**A:** Document Conversion Services can benefit any organization that needs to take control of their paper and critical business documents. Example customers that utilize IDT’s Conversion Services include:

- Health Care customer who already owned an Enterprise Content Management system and needed help with a back file conversion of legacy paper based documents;
- Global Manufacturing customer who had staffing issues due to difficult economic times, yet needed to keep up-to-date with their day forward document scanning initiatives;
- A multi-location, multi-brand Automotive dealership that needed extra help with scanning of their deal-bags;
- An Engineering Firm need to get their mission-critical documents in digital format;
- Manufacturer who had a backlog of microfilm/microfiche they need converted to digital images.

**Q: What is the benefit of document scanning?**

**A:** Paper to Digital Conversion Services from IDT converts your existing paper documents to digital imaging files in a choice of file formats, including but not limited to: TIFF, JBIG, JPEG and PDF.

Text files that include vital indexing information (used to retrieve the documents) can be included with the image files on a variety of media options, including CD-ROM, DVD, and 4mm DAT tape. The images and associated text files can then be imported into your imaging system for instant retrieval throughout your enterprise!

Cuts down on space for papers/files/boxes, makes lookup much easier and faster.

**Q: What specifically are the services around Document Conversion Services that IDT offers?**

**A:** IDT's Conversion Services Division offers full life-cycle document management services including:

- Document Preparation;
- Document Scanning/Capture;
- Image Indexing & Data Entry;
- Bar Coding;
- Image Enhancement;
- Optical Character Recognition (OCR);
- Document Storage & Retrieval;
- Document Destruction Services

All services are available as a Business Outsourced Process (BPO) where all work is done at IDT's Conversion Services facility or in-sourced process where IDT's Conversion Services staff comes to your facility. Whether you need a full-service option with OCR and bar-coding that includes all hardware, software, and staffing or just an extra set of hands that utilize your existing system during a time of peak volume, IDT can help.

**Q: What is document prep? Why is it necessary?**

**A:** "The better the prep, the better the scan." Prepping is properly preparing the documents to be fed thru the scanner.

- ✓ Remove all foreign objects - staples, paperclips, binder clips, etc.;
- ✓ Unfold any papers and any creases or bends (especially corners);
- ✓ Tape anything smaller than a half sheet of paper, and tape any tears or rips;
- ✓ If there is something taped to the document or it is small and double-sided, make a photocopy (after scanning, destroy the photocopy);
- ✓ Separate any joined pages or booklets;
- ✓ Insert barcodes or separator sheets as necessary;
- ✓ Poor quality documents are corrected to the best extent possible, if they cannot be fixed, a "poor original document" will be inserted before the poor document.

### **Q: How are documents shipped and treated while off-site?**

**A:** IDT will work with every client to determine the best possible way to box up loose documents and or ship documents to the IDT Conversion Services Facility. Boxes are treated carefully as they may need to be delivered back to the customer. When boxes are received we take several steps to ensure safety and confidentiality:

- When boxes or documents are received from a client, it is signed for by an IDT Document Specialist and by the client or delivery service (sign off book in scan room, client gets one copy, and we keep one copy for our records);
- At the time we receive documents, we catalog them and begin the tracking process so that we know the status of each document at all times;
- Each box is then checked in, given a unique box number, and updated in a file tracking report (which is also separate for each client). The tracking report is also updated when the box moves from prep, scan, index, and returned, so it is easy to keep track of the documents throughout their imaging life cycle;
- Exceptions that do not meet scanning requirements will be noted in the tracking report. (Examples: Illegible documents, missing indexing information, poor quality).

### **Q: What is your process for document scanning?**

**A:** The document scanning process is focused on the quality of the image that is to be created from the paper documents. Special steps are taken to guarantee that the documents are handled and processed according to the pre-defined scanner settings resulting in high-quality readable images.

Some of the Quality Assurance Performed During this Process include:

- 100% of the images are visually verified and any problem images are re-scanned;
- Document Scanners are cleaned using manufacturer approved and recommended cleaning materials every morning, and as necessary throughout the day;
- Documents stay in the secured scanning area at all times.

### **Q: What is document indexing?**

**A:** The purpose of the Index process is to accurately enter the metadata (data that describes the actual documents) associated with each document. Index values differ with each project, and are specified in each client's scan-index manual. Using the electronic image file, IDT will enter the index values for each document. IDT enters index information for documents using dedicated software with built in validation routines.

Quality Assurance Performed During This Process:

- ✓ The index operator is required to log in to the workstation for audit purposes;
- ✓ Document indexing software automatically validates index data formats and verifies that required values are entered with the correct amount of digits or characters;

- ✓ Double Blind Data Entry can be performed if requested by the customer.

**Q: How do you make sure there are no errors in scanning or indexing? What is your Audit process?**

**A:** After indexing is complete, an Audit will be performed. This means a random manual check of documents page per page compared to what has been scanned and entered, if something is found missing or of poor scanning quality, a full page by page box audit will be performed, and rescans will be done as necessary. The audit includes monitoring Image Quality, Image Quantity, and verification that Index or Metadata is accurate.

The File Tracking Report is reviewed on a daily basis to insure that all boxes are accounted for and that none have been misplaced. The scanning Operations Manager will track all audits and when they are completed.

**Q: How are documents returned or destroyed?**

**A:** Documents will be stored by IDT for 30 days (free of charge) while the customer will complete their own audit to review image files and metadata from conversion.

- IDT will work with the client to determine the best possible schedule for destruction;
- IDT will require a customer's signed authorization before any documents are sent off for final disposition or destruction.

IDT Quality Assurance Performed throughout the Entire Process:

- The Scanning Operations Manager will work with the client during the audit to ensure all data that is being reviewed is what we have converted.
- The Scanning Operations Manager will pull and rescan any and all files upon the request of the customer that may be missing.
- IDT will confirm that the completed image files and metadata match between the IDT system and what was sent off for the client review.

Have a question that we have not addressed here? Send it to us at: [asktheexpert@idt-inc.com](mailto:asktheexpert@idt-inc.com) and we will respond to you!

Warm Regards,

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