

Odegaard Writing and Research Center (OWRC)
Scanning Policy
February 2017

All records have a specific amount of time they must be maintained. This specific amount of time is called a “retention period”. Retention periods are based on the content of a record. Retention periods are found on a tool called a Records Retention Schedule. Retention periods included in Records Retention Schedules apply to all records regardless of their physical form or characteristics.

Once paper records are scanned according to the requirements outlined in this document, the paper records can be destroyed. **It is, however, important to note that the retention period which would have been applied to the paper record must instead be applied to the scanned record.**

Who is responsible for scanning?

To ensure proper use of scanning hardware and quality-control inspection, OWRC Director or Coordinator will scan all departmental receipts. All paper receipts should be retained until the completeness and quality of the scan has been confirmed by Compliance, Budget and Travel Office approvers (through Ariba).

Technical Scanning Requirements

- Black and white, gray, and color paper records can be scanned.
 - Any kind of record can be scanned including color text documents, photographs, and maps, plans, and engineering drawings.
- Scanners must be set at a minimum of 300 dpi (dots per inch).
- Scanned records must be saved as PDF or TIFF files.
- ***Note: JPEG is not acceptable if the scanning is done with the intention of destroying the original paper records.

Quality Control

- Scanned document images must be inspected visually to ensure they are complete (the entire document has been captured), clear and easily read.
- Scanned records should be compared to the original paper document to ensure accuracy.
- The number of original paper documents must be compared to the number of scanned records to ensure that every document was scanned.

Image Enhancement

- Speckles or spots on the scanned image: clean the glass on the scanner and rescan the paper.
- Skewed images that are not properly aligned: rescan the paper so that the image appears straight.
 - All portrait orientation pages should be rotated to read from left to right.
 - All landscape orientation pages should be rotated with the top of the page facing the left.
- Sometimes only part of the document is captured by the scanner: rescan the paper so that it is properly aligned and the entire page is included in the scanned image.
- If the scanned record is of poor quality and is not clearly readable: reset the dpi (dots per inch) setting on the scanner to a setting higher than 300 dpi and scan again.
 - Keep increasing the dpi until the record is as readable as possible.

- Sometimes the condition of the original paper record precludes a good quality scanned image from being produced.
 - In these cases it is necessary to document the problem to avoid future confusion over the poor quality of the scanned image. There are several different ways this can be accomplished:
 - Keep the paper copy of the records that did not scan well; or
 - Tag the image in metadata as “best scan possible”. When saving to a networked drive or storage location (e.g. I-drive) use Acrobat Pro “Additional Metadata” in the Document Properties description tab; or
 - When indexing/naming the document include, “best scan possible”.

Steps for Improving Images

1. If your quality-control inspection reveals that your documents are hard to read, try changing the settings on the scanner. The copier/scanner usually provides the following features under the “IMAGE QUALITY” tab:
 - Type of original (photo and text, text, photo, halftone photo)
 - Image options (lighten/darken, sharpness, screen)
 - Image enhancement (background suppression, contrast).
2. The most common problem in scanning receipts is a too-faint image, since taxi cabs and other businesses that still issue paper receipts to travelers often have unsophisticated printing equipment.
 - To remedy a too-faint image, drag the “lighten/darken” slider all the way to dark and scan again.
 - Do not tape a small, faint receipt to a document with darker type, because the corrections you make in order to scan the faint text will make the normal text too hard to read.
3. Another common difficulty arises when a background color or pattern, such as a “watermark” on a hotel folio, interferes with readability of the charge and payment information.
 - To address this problem, be sure “Background suppression” (under “Image enhancement”) is selected:
 - If there are speckles on the scanned image, clean the scanner glass.
4. To address an incomplete scan, make sure you have not obscured important information by taping small receipts to larger receipts.
 - If part of a page fails to scan because the page is an odd size (e.g., a European hotel folio), either make two scans, adjust the image size settings, or reposition the original so that all of the relevant text is captured.
5. If the image is blurry, try increasing the scanning resolution and scan again until the image is clear.

***Note: When it is not possible to produce a complete, clear, or easily read scanned image, the hard copy document must be retained.

Data Security Issues

- Sensitive information, such as credit card numbers, should be obscured on all documents that will be attached in Ariba.
- When an employee leaves the department, it is the responsibility of the department’s Administrator to close all related accounts and remove all access for the employee, including access to Ariba applications through Astra.