

# DECISION GUIDE

## STOP PAYING TO HANDLE PAPER MULTIPLE TIMES

### // WHICH BACKFILE APPROACH FITS YOU?

Prep is what makes backfile conversion expensive. Sorting, removing staples, inserting separator sheets, and the quality checks that follow all cost more than the scan itself. Your staff handles the same paper repeatedly, and every workaround adds labor. Two approaches take that cost out, and the right one depends on how you already work. The worksheet on page 2 settles it with your team.

#### ONE-TOUCH SCANNING: FALCON®+ OR GEMINI® SCANNERS WITH RIGHT-SPEED™ SCANNING, POWERED BY CERTAINSCAN®

Change how documents get captured so your team handles them once. Operators open a folder, scan, and refile. CertainScan classifies documents, inserts virtual separators, captures metadata, and runs quality control automatically. You remove prep labor from the process, one tracked operator handles each document, and the output is ready for search and AI.

##### WHAT IT ASKS OF YOU:

You rethink your capture workflow around the One-Touch model, which takes more up front. The payoff is lower total labor over the life of the project.

#### DROP-IN SCANNING: VELO™ DESKTOP AND PRODUCTION SCANNERS, OPEN TWAIN AND ISIS

Change how documents get captured so your team handles them once. Operators open a folder, scan, and refile. CertainScan classifies documents, inserts virtual separators, captures metadata, and runs quality control automatically. You remove prep labor from the process, one tracked operator handles each document, and the output is ready for search and AI.

##### WHAT IT ASKS OF YOU:

You rethink your capture workflow around the One-Touch model, which takes more up front. The payoff is lower total labor over the life of the project.

### // WHICH ONE FITS YOU

#### LEAN TOWARD PATH A IF YOU:

- Are modernizing now: a new EHR or ERP, a digital-transformation program, or an AI initiative
- Handle high volumes of mixed or fragile documents
- Have leadership backing to change how document capture works
- See manual prep and repeated handling as your biggest cost

CHECKS IN COLUMN A: \_\_\_\_\_

#### LEAN TOWARD PATH B IF YOU:

- Run a capture or ECM system (for example Kofax or Hyland) and want to keep it
- Have a compliance or project deadline and need paper digitized quickly
- Operate a service bureau, BPO, or distributed sites
- Want to standardize an existing scanner fleet on proven systems

CHECKS IN COLUMN B: \_\_\_\_\_

Both paths end in the same place, with digital records your staff can search and your systems and AI can use. You reclaim floor space, cut retrieval time, and put fewer hands on sensitive documents.



**65%**

Lower document-prep labor cost after moving to One-Touch scanning

Guarantee Trust Life



**30%**

Efficiency gain digitizing government records

Iron Mountain Government Solutions



**250**

Documents per hour, about 33% faster than the system it replaced

An Post Commerce

#### STILL DECIDING?

Let's map your prep cost together. We walk your current handling steps with you, put a number on the labor you can take out, and match you to the path that fits.



[www.opex.com/solutions/backfile-conversion](http://www.opex.com/solutions/backfile-conversion)

# // SELF-ASSESSMENT WORKSHEET

## SCORE YOUR PATH IN 10 MINUTES

Complete this worksheet with the stakeholders who own records, operations, and information technology. Check each statement that reflects your organization's current state rather than its intended state, then total the checks in each column

### COLUMN A

- ☐ Your capture or ECM software (for example, Tungsten Automation or Hyland) is tuned, validated, and working, and you intend to keep it
- ☐ A hard date is driving this project: a compliance deadline, an audit, a facility move, or a lease expiry
- ☐ Your batch classes, validation rules, and delivery targets took years to get right
- ☐ You own the scanning equipment decision, but someone else owns the capture process
- ☐ Retraining operators or requesting information technology change windows is slow or hard to justify right now
- ☐ Much of your paper is clean and consistent, and throughput is the bottleneck
- ☐ Aging scanners are the problem you were sent to fix, not the process around them

### COLUMN B

- ☐ You have a modernization effort underway or funded: a new EHR or ERP, a digital-transformation program, or an AI initiative that needs your records as data
- ☐ Several people touch each document between the shelf and the scanner
- ☐ Separator sheets, staple removal, and document repair show up as real line items in your project estimates
- ☐ Your backfile is a mix of sizes, conditions, and document types rather than uniform pages
- ☐ Leadership would support changing the capture process if the labor savings were quantified
- ☐ You are hiring, or struggling to hire, staff whose main job is document prep
- ☐ Total labor over the life of the project matters more to you than how fast the system stands up

### MOSTLY A

Prep labor is where your cost sits. Bring your prep headcount and loaded hourly cost, and we will put a number on how much of it One-Touch scanning removes.

### MOSTLY B

Your capture workflow is worth keeping. Bring your throughput targets and capture software details, and we will scope the integration, the image requirements, and time to stand up.

### CLOSE OR SPLIT

A close score is common. Bring both sets of numbers, and we will recommend which path to start with and what the second step looks like.

## ITEMS WORTH HAVING ON HAND FOR THE ASSESSMENT

- Rough volume of boxes, cabinets, or estimated images
- A sample of typical documents, including the worst ones
- Current capture software and where images must land
- Prep headcount and loaded hourly cost, even approximate
- Deadline dates and what is driving them
- Document condition concerns such as fragile, bound, or oversized items

### BRING YOUR SCORE TO A PREP-COST ASSESSMENT

A 30-minute working session with an OPEX scanning specialist. We map your handling steps, put a number on every touch, and recommend a path, even if it is the one you are already on.