

Document Management & Digital Archiving Solutions



Introduction and Overview

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Document Management: Background & Statistics

- ◆ The average document is copied either physically or electronically an average of 10 times, at a total cost of 22\$ (US)
- ◆ Retrieving a mis-filed document can cost about \$150 (US)
- ◆ 25% of enterprise documents are misplaced and will never be located
- ◆ Document mis-management can claim up too:
 - 40% - 60% of Office Workers Time
 - 20% - 45% of Labour Costs
 - 12% - 15% of Corporate Revenue

Benefits of a Basic Document Management Solution:

- ☑ [Disaster Recovery](#): Easy backup & storage offsite
- ☑ [Productivity Gains](#): You are no longer manually digging through file cabinets when trying to locate a document
- ☑ [Accessibility](#): Documents can be viewed by many people within your office or from remote off-site locations
- ☑ [Organization](#): Documents don't become lost since there is no need to re-file
- ☑ [Space Efficiency](#): Save office and cabinet space in your office / workplace
- ☑ [Cost Savings](#): Employee and company resources are free from the manual handling, filing and re-filing of paper documents.

Overview of a Basic Archiving Solution:

A simple document management and archival solution will allow you to scan & store your paper documents into digital form and easily retrieve them for greater organization, safety and security as well as ease of use and access to your documents at the click of a button.

Paper Documents

Networked Computer
or Server



Scanning Device



Easy Retrieval Across
Your Network

Example:

Simple Document Management Concept using Middleware with Routing and OCR (Optical Character Recognition) capability.

There are three main steps to a simple Doc Management Solution:

1. Scanning

2. Routing & Middleware

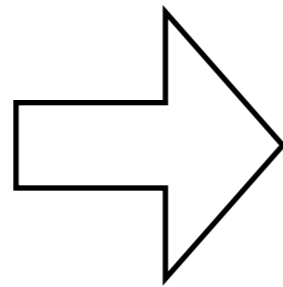
3. Repository, Management & Retrieval

Step 1: Scanning

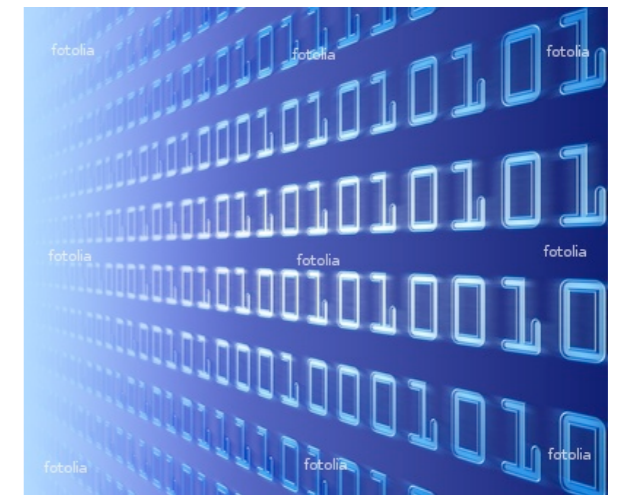
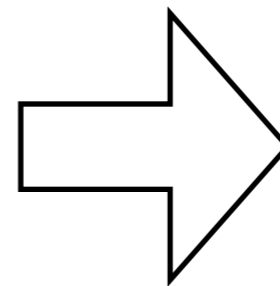
Paper documents are converted into digital form using a scanner or MFP device.



Paper Documents



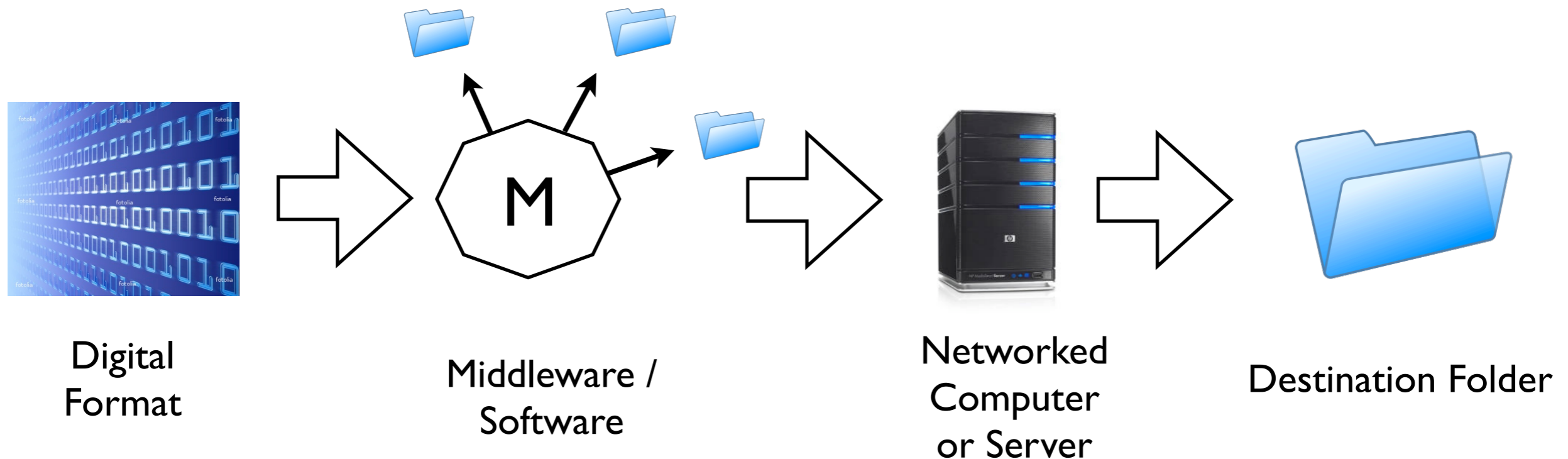
MFP / Scanning Device



Digital Format

Step 2: Routing & Middleware

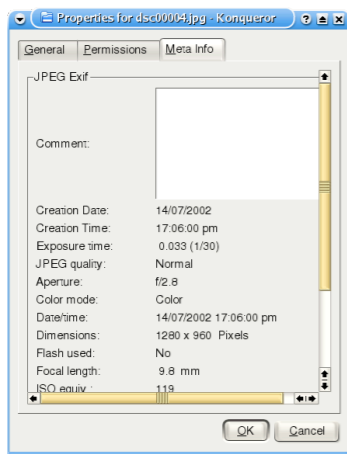
After the documents are converted into digital format, they are routed to a specific folder or destination either directly from the MFP or through middleware (software that enhances the delivery and distribution of scanned docs).



Step 2: Routing & Middleware

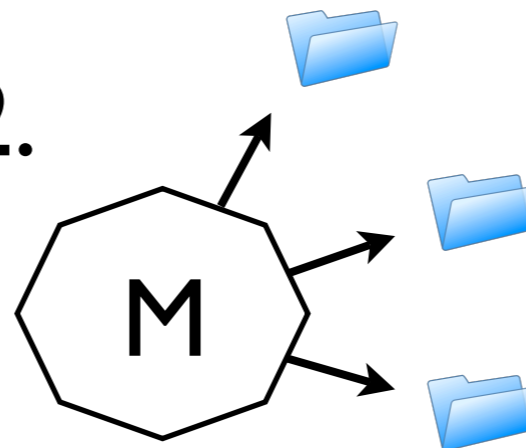
Middleware can be a powerful addition to your solution by allowing you to apply special characteristics to the files you scan into digital form such as: 1) attaching special labels, names or number references to a file (known as Meta Data). 2) Route documents to specific folders and locations on a server or hard drive. 3) Apply OCR (Optical Character Recognition) to text based documents - which will make them fully “searchable” using any name or number reference contained in the file.

1.



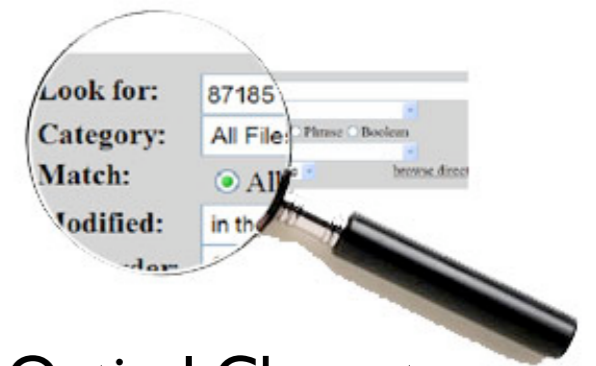
Add Meta Data to Your Scanned File

2.



Route Documents to Specific Folders and Hard Drives

3.



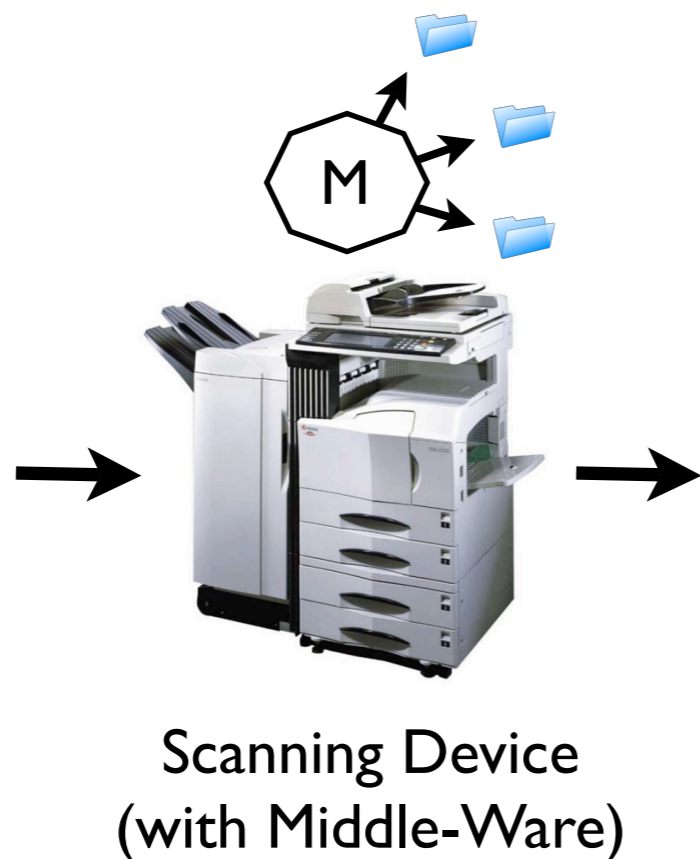
Optical Character Recognition (OCR) Allows for Searchable Text and PDF files

A side-note on OCR (Optical Character Recognition)

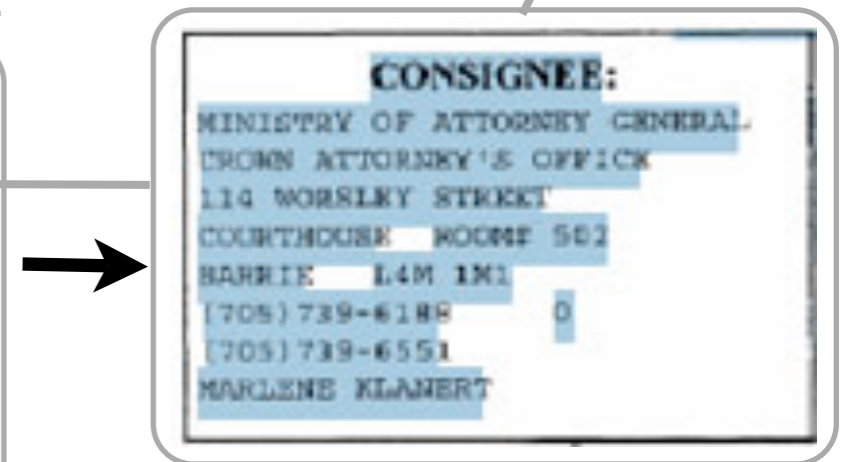
With OCR enabled middleware, all text and number references contained in the sample document are converted into searchable text - for easy search and retrieval. The only thing to remember is that your original documents must be of high enough quality to ensure accuracy of the OCR software (For instance, faxed documents are sometimes of low quality and are therefore susceptible to flaws in the scanning process).



Original Document



OCR is applied to Scanned Document



Through OCR Searchable Text is Associated with every document you scan to the database

Step 2: Routing & Middleware

The following are various kinds of middleware available for a document management / archival application that will route files and do OCR:

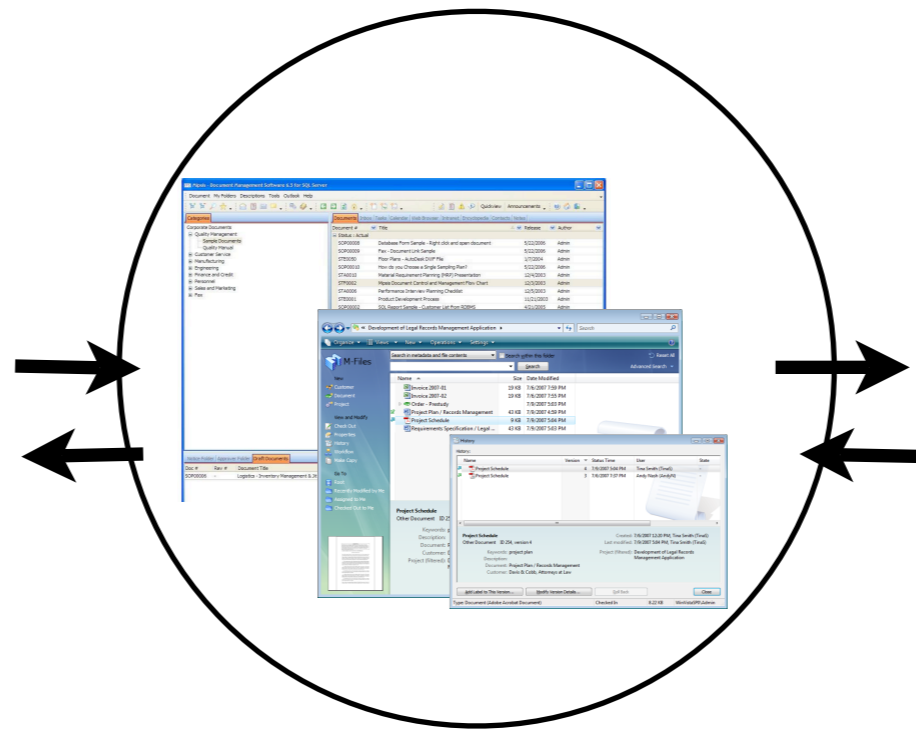
- Kyocapture / AutoStore,
- HP DSS,
- Panasonic DDS,
- Samsung SmartThru Workflow

Step 3: Repository, Management and Retrieval

Easy Retrieval of Documents
Across Your Network



Networked Computer
or Server



Document Management
Software

Step 3: Repository, Management and Retrieval

*Once documents have been scanned into a central database, users access and manage the electronic files using document management software.



A simple software program such as “Index Search” can be used to find your scanned documents using any number or name references within the file. It will display an abstract of the textual information contained in the file so you can verify if it is the correct file you are searching for.

Step 3: Repository, Management and Retrieval

There are many different software packages out there that can be used to manage and retrieve electronic documents.

Some of these packages have powerful features, and can range in cost from between \$10,000 to \$500,000 depending on the level of customization. Users should evaluate what their true needs are when deciding on what kind of solution is best for them.

Step 3: Repository, Management and Retrieval

Most basic software packages will allow users to search for electronic documents based on any text or number references contained in the document (that were captured in the OCR process). Documents can also be searched by date, type or any other information that was programmed into the Meta Data of the scanned document. A basic solution such as this can cost as little as \$1000 - \$3000, and depending on the vendor is sometimes included in the purchase of an MFP or scanning device.

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