

How to streamline your transition to digital document management

WHITEPAPER



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The main benefit for your business may come from the space saved by eliminating physical records rooms, or the increased collaboration efficiency enabled by remote document storage from a central location.

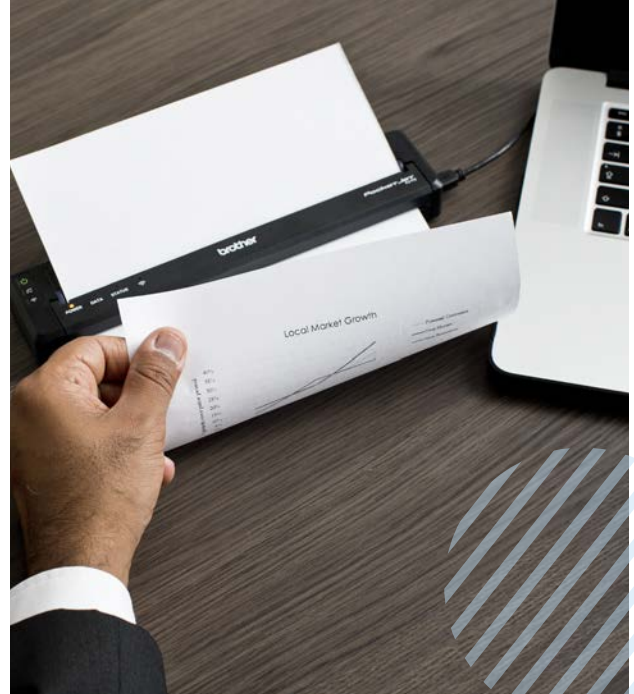
Digital document management is a more convenient, affordable and secure way to deal with your organisation's information. Whether you possess an archive of paper documents stretching back decades, you're generating many new files daily, or both. Relying too heavily on physical storage comes with its drawbacks.

Companies are digitising their records because they have seen the budgetary, usability and security benefits of modernisation. You can follow this path to value and security and accessibility as well, but your strategy must be up to the task. This whitepaper will demonstrate the tactics and technologies to make this transition to a new model as smooth as possible.



Establish your digitisation strategy


Converting physical documents into digital data is not a one-step process, and there are a few important questions to ask while setting up your new strategy. Taking care of all these considerations as early as possible will ensure your organisation's transformation goes off without a hitch.



What are the legal requirements for your industry?

Perhaps most importantly, your new digital document management practices must fit legal requirements. While regulations will naturally be tighter in fields such as healthcare, where privileged patient information is carefully controlled, you must be aware of what you are storing and how and where you are storing it, regardless of industry.

Legal obligations take a few forms, depending on the type of data in question. While some files must be retained for specified periods of time, other categories of records must be deleted after a certain span has elapsed. It's important to have capable systems in place like searchable PDF to identify and retrieve records, both to ensure your data storage is in compliance from day to day and to respond in a timely manner when performing discovery for auditing or management requests.



How will you convert the files into a useful digital format?

When converting documents into a digital format, companies should make sure to adhere to best practices of information governance to ensure confidentiality, integrity and accessibility of data. Being able to find data within your document management system is essential, not just for compliance reasons but also for simple convenience and efficiency. When a scanning program simply saves the newly digitised documents as “flat” image files without searchable text, it can be unnecessarily difficult to recall a file on demand. This is why to reap the full benefits of digital document management, you must use purpose-built software.

Features such as Optical Character Recognition (OCR) are essential for making the data in your documents more useful and functional than their paper counterparts. When employees are able to search within the text of documents, they can quickly find the data they need to complete projects, saving man-hours. When this isn't possible, digital archives are at risk of becoming as hard to navigate as the filing cabinets they are designed to replace.

What type of hardware and software best suits your company's needs?

Creating the perfect **combination of hardware and software** is a must for any company pursuing document digitisation. Careful selection of a document scanner, as well as the network of digital tools used to process and store the newly converted content, can turn your new digital data management program into a value centre. In practice, this may mean a combination of solutions such as the following:

HIGH-VOLUME OFFICE SCANNERS

The **right scanning device** for your transition to digital document management could make the process less cumbersome. A dedicated scanner equipped with an Automatic Document Feeder (ADF) addresses the volume of paper a user wants to digitise and ultimately prevents unnecessary labour on behalf of users. The number of pages an ADF can hold is often an overlooked feature which can save time both during scanning and post processing, if a user can scan a batch of documents in one go as opposed to several batches where the user will need to piece document pages together.



SINGLE-PASS DOUBLE-SIDED (DUPLEX) SCANNING

Another key feature of high-volume scanners is the ability to scan both sides of documents in a single pass. The time saved by this feature is considerable, and the need to only scan each paper file once also reduces the risk of human error. One trip through the scanner per sheet of paper is as simple as workflows come.

POST-CAPTURE PROCESSING FEATURES

OCR is one of the most important post-processing tools that you should combine with a commercial scanner to make your new digital document management program a success. Other options include the ability to automatically remove blank pages, and to fill in the spaces where circular hole-punch marks appear in the documents.

AUTOMATED SCANNING

Your scanning operations become more likely to succeed the more automation you put in place. Helpful features such as preconfigured shortcuts for scanned documents reduce the likelihood of human error while cutting down on manual labour. At the push of a button, documents are scanned with the correct image settings, saved to a directory where they'll be easy to find on demand and given a file name in line with your company's conventions.





Integrate your hardware and software

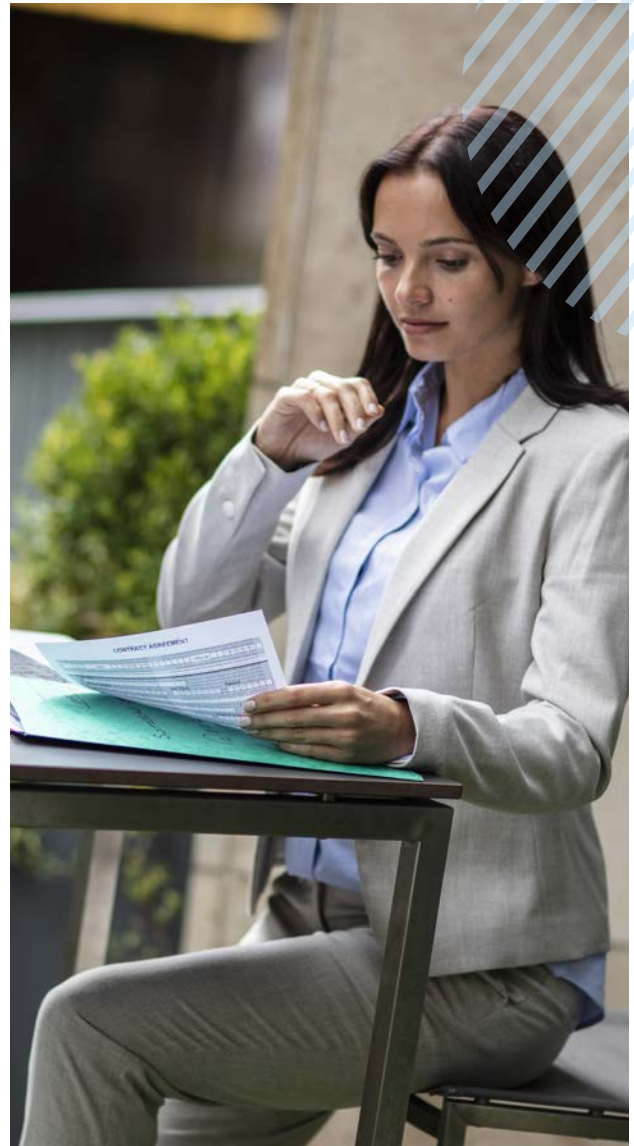
Whether you're building a new digital document management strategy from scratch — hardware and software — or integrating new scanners into an existing data storage workflow, it's important to have all your assets working in tandem.

Brother's commercial scanners ship with bundled software from leading workflow management providers, allowing your team to immediately use features such as scanning shortcuts and OCR. When you already possess a digital platform, you can connect your scanners to your existing third-party applications through [Brother Solution Interface \(BSI\)](#).

Reap the rewards of digital document management

There are as many ways to use digital document management as there are companies. The main benefit for your business may come from the space saved by eliminating physical records rooms, or the increased collaboration efficiency enabled by remote document storage from a central location. Your field teams can use portable scanners to immediately enter data for consideration, and your office teams can keep data more securely by scanning it than holding it in a physical format.

Whatever the exact reasons why your organisation is transitioning to digital document management, it's clear that this new workflow represents the future of data storage and access. When you take a strategic approach, aided by the best in hardware and software, you're setting your program up for success.



Contact Brother to find out more about we can help your business transform paper documents to digital.

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