

## Basics for Document Imaging & Management Systems

**Document management is the conversion of paper documents into electronic images on your computer. Once on your desktop, these documents can be retrieved effortlessly in seconds.**

Thousands of organizations around the world use document management every day instead of paper filing systems. The reasons for this change are simple:

### **Document Management:**

- Prevents lost records.
- Saves storage space.
- Manages records easily.
- Finds documents quickly.
- Makes images centrally available.
- Eliminates the need for file cabinets.

**The program saves both an image file (an actual picture of the original document) and a text file created by the program through its OCR (character recognition) capabilities.** It's a Windows-based program that can be accessed on an internal network, an intranet and/or via the Internet. The program has full-text search and proximity searches. The files are saved in a standard folder tree similar to what you would expect to see in any common file manager program. It even has annotation features like highlighting, redacting and virtual "sticky" notes.

**Laserfiche can support an unlimited number of documents and is expandable and upgradable to accommodate needs that may not exist at the time of installation.**

The volume and type of documents expected to be added each year the level and type of access desired for each document the desired retention period for each document.

### **The steps necessary to introduce document management:**

Documents are **scanned** into the system. The document management system **stores** them somewhere on a hard drive or optical disk. The documents then get **indexed**. When a person later wants to read a document, he or she uses the **retrieval** tools available in the document management system. Which documents can be read and what actions performed on these documents is dependent on the **access** provided by the document management system.

### **A complete document management system comprises five elements:**

#### **• Input**

Major advancements in scanning technology make paper document conversion fast, inexpensive and easy. A good scanner will make putting paper files into your computer easy. In addition documents can be input using SnapShot, which enables you to use a print-to-file type feature, and drag-and-drop methods.

#### **• Storage**

The storage system provides long-term and reliable storage for documents. A good storage system will accommodate changing documents, growing volumes and advancing technology.

#### **• Indexing**

The index system creates an organized document filing system and makes future retrieval simple and efficient. A good indexing system will make existing procedures and systems more effective.

#### **• Retrieval**

The retrieval system uses information about the documents, including index and text, to find images stored in the system. A good retrieval system will make finding the right documents fast and easy. Document viewing should be readily available to those who need it, with the flexibility to control access to system. A good access system will make documents viewable to authorized personnel, whether in the office, at different locations, or over the Internet.

#### **• Retention/Destruction**

A document management system with the records management feature will enable documents to be tied to a records retention schedule. This allows the documents that have reached the end of their retention schedule to be quickly identified and destroyed. By overwriting the files a number of times, the documents are effectively "shredded."