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Automated Document Capture, Storage and Retrieval *by Tim Nissen of DocuLex*

Instant document access of client and case files by users of varying technical competency and a low maintenance environment enjoyed by both users and system administrators is at hand. Thanks to Web enabled search and retrieval with secure access from any location with an Internet connection, document management gets no better!

Many capture and retrieval programs available today, like DocuLex Archive Studio, are capable and economically viable for firms and corporate departments of all sizes and budgets. With redundant storage increasingly affordable and dependable, information access supported with automated distributed paper and electronic document capture as the front end facilitator is driving development and demand for this new class of software with the user intuitive trend.

Interface

Particularly beneficial to the uninitiated user are the intuitive, visually appealing interfaces these programs feature, with functionality similar to an Internet search engine key word query. The server based software automates complex documentation organizational functions including file room views (a visual representation of hard copy documents housed in a physical records library), creating a low maintenance environment appreciated by all.

Security

The programs manage SSL remote security and retrieval of various file formats including MS Office, PDF and MS Outlook email. They also provides activity tracking and retrieval logs assisting in compliance of privacy laws including HIPAA and Sarbanes Oxley.

Capture

The document capture capability has advanced in step with retrieval. Distributed abilities now enable expanded capture points incorporating virtually any onsite or off site device equipped with a document scanner and network accessibility: digital copiers/MFPs, facsimile units and desktop/production scanners using scan to file ware, allowing walk up and scan, then walk away convenience. These fully automated paper to electronic document conversion programs with electronic Office file capture provide distributed document capture via the document contents identification software placed on users PCs, functioning in tandem with a server based component that automates document image processing.

Intelligent cover page technologies allow documents to be profiled and cataloged prior to scanning. Indexing criteria may be added via optical mark recognition or 2D barcodes created with user defined content. These capture programs open on the users PC and are often available as freeware for unlimited distribution throughout an organization. With document in hand, the user adds the document's key profile points, prints the profile cover sheet and scans the document along with its profile. Direct output paths are available for network folders, FTP and email addresses, as well as printers for immediate hard copy duplication.

Storage

For workflow and editing convenience, electronic documents are captured, indexed and custom foldered in their native formats rather than converted to PDF or other indicated storage format.

The server based component recognizes content housed in the profile cover sheet accompanying the document to be foldered on the server, fully indexing the document, naming the file and forwarding the fully searchable PDF or MS Office file to the user defined destination. The destination may be one or many locations, including an FTP address, email, printer, network, local folder or a users desktop. If the appropriate folder does not exist, one is created by the program and located logically within the folder structure. This file transfer provides content indicative custom folder and subfolder creation based upon document profile values set by the user.

Retrieval

Retrieval programs are SQL or SQL Express-supported for scaling file volumes, providing users with Microsoft off the shelf database power. The Active Directory integration enables heightened security and user permission access and tracking, with public key infrastructure (PKI) providing encryption and digital signature security for both local storage and hosting environment outsourcing of daily use information access.

Explore

Document management gets no better. If low maintenance, instant access and automated electronic documentation sounds as viable for your organization as it has proved to be for many others, you will want to set out on an exploration.

About our author . . .

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