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MANAGER

# DM

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DOCUMENT MANAGEMENT  
IMAGING & CAPTURE  
WORKFLOW/BPM  
CONTENT MANAGEMENT

## Research:

Bridging the AI divide

## Technology:

Content sentience is coming

## Strategy:

Breaking our attachment to paper

## Market focus:

Navigating public sector challenges

OPINIONS • REVIEWS • CASE STUDIES • INTERVIEWS

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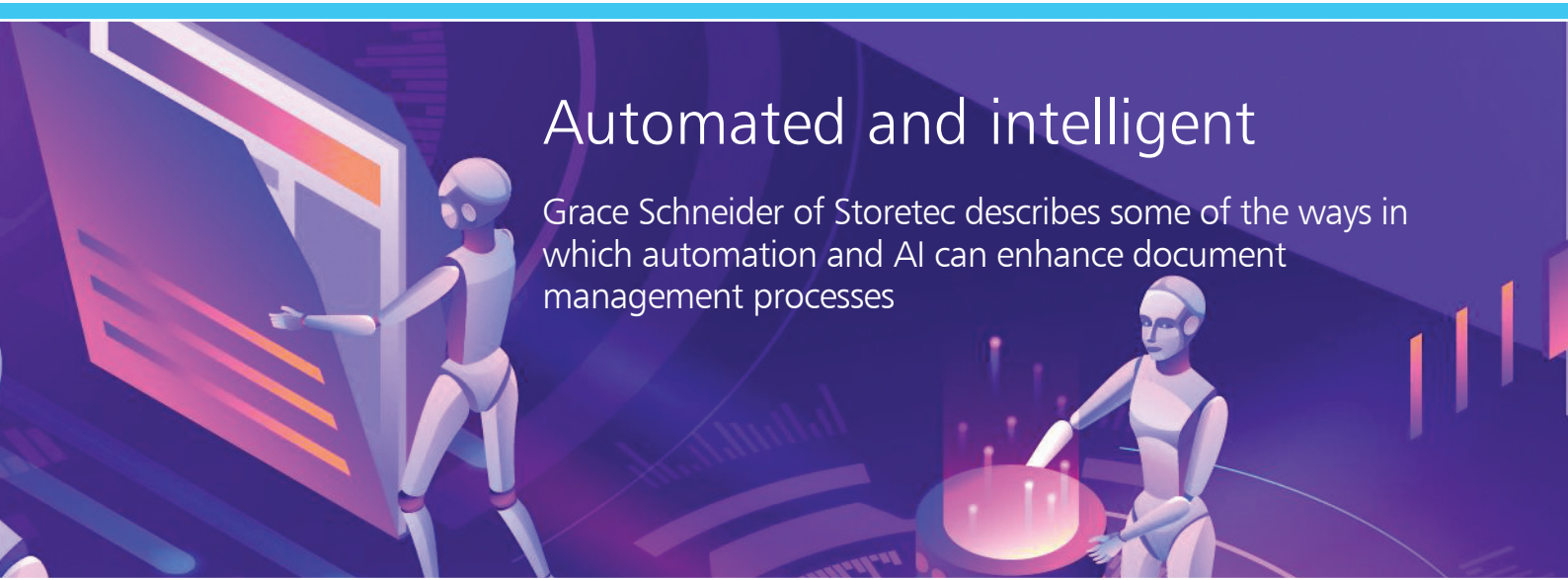
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## Automated and intelligent

Grace Schneider of Storetec describes some of the ways in which automation and AI can enhance document management processes

Efficient document management is essential for organisations to maintain competitiveness and ensure compliance with regulatory requirements. However, human errors in document management processes have been a longstanding challenge, leading to issues such as misplaced documents, outdated information, and incorrect data entry.

Fortunately, the integration of automation and Artificial Intelligence (AI) technologies into information management has emerged as a powerful solution to mitigate these errors and streamline operations.

### AUTOMATION: A GAME-CHANGER IN DOCUMENT CAPTURE

One of the primary sources of human error in document management is manual data entry. Whether it's transcribing handwritten notes or manually inputting information from paper documents into digital systems, this process is prone to mistakes. Enter automation, specifically Optical Character Recognition (OCR) technology.

OCR is a cutting-edge automation tool that can swiftly and accurately extract text from scanned documents. By implementing OCR in document management processes, organisations can significantly reduce the risk of errors caused by manual data entry. OCR not only boosts accuracy but also enhances efficiency, enabling large volumes of documents to be processed rapidly with minimal human intervention.

### STREAMLINING DOCUMENT ROUTING

Another common pitfall in document management is routing errors. Documents frequently need to be directed to specific individuals or departments, and when this process is handled manually, it's susceptible to errors such as sending documents to the wrong recipient or department. Automation offers an easy solution by establishing automated workflows for document routing.

Automated document routing ensures that documents are seamlessly directed to the appropriate recipients, eliminating the possibility of routing errors. Workflow automation systems can intelligently route documents based on predefined criteria, ensuring that sensitive information reaches only authorised personnel, all while improving overall efficiency and reducing the risk of bottlenecks.

### EFFORTLESS DOCUMENT RETRIEVAL

Locating documents promptly when needed is vital for efficient business operations. Misplaced or lost documents can lead to costly delays and disrupt workflow. To address this challenge, organisations can implement automated document retrieval systems.

Document management solutions like Storetec's proprietary system, FreeDocs, offer automated document retrieval features. Authorised personnel can effortlessly access documents through a user-friendly interface using OCR content search, reducing the

likelihood of errors due to misplaced or lost documents. Automated indexing and tagging further enhance document searchability, ensuring documents are always at your fingertips.

### DOCUMENT REVIEW & APPROVAL

Timely document review and approval are crucial to prevent bottlenecks and ensure compliance with deadlines. Human errors can lead to delays and missed opportunities. Automation can streamline the document review and approval process.

With tools like FreeDocs, automated workflows can be set up to route documents to the appropriate personnel for review and approval. Automated reminders can be sent to ensure that deadlines are met, minimising the risk of delays due to oversight or human error. This not only improves efficiency but also enhances accuracy in the review and approval process.

### PRECISION IN ARCHIVING & RETENTION

Properly storing and retaining documents according to predefined policies is essential for regulatory compliance. Failure to adhere to these policies can result in legal issues and financial penalties.

Automation can play a pivotal role in ensuring the correct archiving and retention of documents. Through automated workflows within document management systems, documents can be automatically archived and retained based on predetermined retention policies. This



eliminates the risk of human error in managing document lifecycles and ensures that organisations remain compliant with regulatory requirements.

#### EMPOWERING DM WITH AI

While automation addresses many aspects of document management, Artificial Intelligence takes information management to the next level by introducing intelligent decision-making capabilities. Here's how AI can positively impact information management:

#### CLASSIFICATION OF LARGE DOCUMENT SETS

Managing large sets of documents can be overwhelming and error-prone. AI-driven document classification systems excel at analysing and categorising documents efficiently and accurately. These systems can automatically identify document types, extract relevant metadata, and assign appropriate tags. By doing so, they reduce the risk of misclassification and speed up document retrieval.

#### RETENTION POLICY APPLICATION

AI can assist in enforcing document retention policies by continuously monitoring documents and flagging those that require action, such as archiving or disposal. This ensures compliance with both industry-specific regulations and internal policies, reducing the chances of legal issues stemming from improperly

managed documents.

#### COMPLIANCE MANAGEMENT

AI provides a robust tool for managing compliance by monitoring documents and data for adherence to regulatory standards. With the ability to identify deviations and inconsistencies, AI helps organisations maintain compliance more effectively, reducing the risk of non-compliance penalties.

#### STRUCTURED DATA FOR THE FUTURE

AI-driven information management enables organisations to extract structured data from unstructured documents. This structured data is essential for advanced analytics, reporting, and decision-making. AI systems can automatically process documents to extract valuable information, making it readily available for future use.

#### DATA QUALITY ENHANCEMENT

Errors in documents, such as typos or inconsistencies, can compromise data integrity. AI-powered data validation and cleansing processes identify and rectify these errors, ensuring that the data remains accurate and reliable.

#### PREDICTIVE INSIGHTS

AI leverages historical data to provide predictive insights into document management trends and patterns. By analysing past document behaviour, organisations can make informed decisions

about document handling, storage, and archiving strategies.

#### THE FUTURE OF DOCUMENT MANAGEMENT

Automation and AI technologies are revolutionising document management by reducing human errors, enhancing efficiency, and ensuring compliance. Implementing automation tools like OCR, automated workflows, and document retrieval systems can streamline operations and eliminate many common errors in document management processes.

Moreover, the integration of AI amplifies the benefits by providing intelligent classification, retention policy enforcement, compliance management, structured data extraction, data quality enhancement, and predictive insights.

For organisations like Storetec, specialised in document scanning, storage, and management, embracing automation and AI is not just a means to improve their internal processes but also a way to offer clients more accurate, efficient, and cost-effective document management solutions.

As technology continues to advance, the future of document management looks increasingly promising, with FreeDocs leading the way in eliminating errors and driving operational excellence. Get in touch today to learn how FreeDocs can redefine your document management experience.

**More info:** [www.storetec.net](http://www.storetec.net)