Document Management: A First Step to Digital Transformation

Today, digital transformation is an overarching priority for the leaders of companies both large and small. In most cases, it is defining the company's business strategy. Changes to how companies handled paper and processes were driven by the recent global pandemic. Walking paper documents around an organization for collaboration, processing, and approvals was not possible in a virtual workplace. While many companies have put stop-gap measures in place, the evolution of how people work (in-person, hybrid, and remote) and how consumers share documents, has created a unique business challenge.

DIGITAL DOCUMENT MANAGEMENT HAS TAKEN CENTER STAGE

A digital document management system has become the primary first step in the digital transformation journey. Companies are looking for solutions that allow for the consumption of documents being submitted from clients in a variety of file formats. And equally important, they are looking to account for the different submission methods such as via email, web portals, texting, social platforms, and even traditional mailing.

There are several options available to companies who are looking for a digital document management solution. Everything from an "out-of-the-box" software solution to building your own custom application. For those who have developers on staff, or companies who are looking to an Independent Software Vendor (ISV) to build a custom solution, there are technologies that can be embedded into an application to speed up the overall development time and deliver a robust set of collaboration tools and functionalities for users.

TECHNOLOGIES AVAILABLE TO ENHANCE A DIGITAL DOCUMENT MANAGEMENT APPLICATION

One of the key benefits of building a custom document management application is the ability for companies to build features and functionalities that align with the needs of their employees and also maintain document security all inside of the application. In the push to keep up with business demands, many companies have purchased a multitude of applications to support the viewing and editing of all the different files that employees need to process. Unfortunately, collaboration inside these tools is difficult. One employee marks up a document and emails the document to a second employee who marks up the document and emails it back. The risk of losing control of the correct version is extremely probable and the time to process the document is hindered by the back and forth emailing process. By customizing your document management application with third-party technologies, your employees and customers will benefit from improved document processing times. Here are some of the technologies that can improve processing times:

Secure Viewing and Collaboration

Incorporating an HTML5 viewer into a document management application addresses the ability to view multiple file types, conduct rapid searches, and track annotation comments all while maintaining the integrity of the original file. Developers can utilize APIs to manage access privileges, making it difficult for anyone without authorization to obtain their own copy of the documents they're reviewing.

PDF Management and Editing

PDFs have become a standard for file management. Because PDFs are secure documents, editing these files is almost improbable. The challenge comes when a document that needs to be replicated and changed, is only accessible as a PDF. Having a viewer in your application that can convert the PDF into an editable format is a huge value to many organizations.

Image Clean Up and OCR

Some of the documents your company receives have been scanned for other documents, with almost everyone having a cell phone nowadays, many documents are captured via the cell phone camera. In order for employees to be able to run searches on these documents for needed information, you need an OCR tool to make the text searchable. These image files can arrive with a skewed angle or issues such as speckling. In order for the OCR engine to return the most accurate searchable text, it is ideal to pass these files through a product that can remove these issues.

Document Redaction

Protecting privacy has become a top priority for many companies. The ability to redact personally identifiable information (PII) is one of the simplest ways to ensure that confidential data remains private. Automated tools can be set up to redact obvious identifying information like names, addresses, or identification numbers, but they should also be able to be applied manually as well. This ensures that any detail contained within a customer's record can be removed from the document before it's sent on for additional processing.

Document Annotation

One of the easiest ways of collaborating on a document is to mark it with annotations. These can be anything from text boxes, drawn marks, or arrows, to stamps that signify completion or additional processing needed. By integrating annotation features into the document management applications, users have a powerful communication tool that saves them time and improves clarity.

Splitting and Merging Documents

O As we noted earlier, your company is receiving files in a variety of formats. Additionally, these documents are potentially being sent one page per file. This is uncommonly true when it comes to scanned copies of files and especially from cell phone cameras. With no way to fix these documents within the system, support staff will be forced to rely on external applications or to print and rescan to arrange them properly, which is both inefficient and potentially insecure.

Companies can save valuable time managing these documents by incorporating splitting and merging tools into their applications. Rather than copying and pasting or rescanning documents, employees can simply disassemble or reassemble them programmatically. This allows them to quickly consolidate records, combining relevant documents into a single, comprehensive PDF that's easier to track and manage.

CREATING YOUR OWN APPLICATION FOR BETTER DIGITAL DOCUMENT PROCESSING

In conclusion, there are many exciting benefits to integrating third-party technologies into your application. In addition to keeping up with the times and improving your company's resiliency, your employees will be able to remain productive throughout the document management process.

To learn more about integrating
third-party document processing
technologies, visit the

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