

A Simple Introduction to

Document Conversion

How to improve your document management and get the results you really want

A Publication of MEDI

www.medimicro.com | sales@medimicro.com | 800.731.6334



Table of Contents

Introduction

Chapter 1

Chapter 2

Chapter 3

Conclusion

Contact Us



Introduction

To Document Conversion

With legal requirements to keep files for long periods of time, the conversion of legacy records into a digital format ensures your organization will have access to critical documents.

The cost of not converting hard copy into digital formats is more than the obvious costs associated with storage, however, the simple act of eliminating the cost of the storage space alone will cover the costs associated with digitalization of your records in a relative short amount of time.

While cost control is important, the true value in digital conversion comes from having your information at your finger tips. Improved workflow, business agility, and productivity are the true benefits digital conversion and how ROI is judged.

A typical office spends over \$25,000 to fill a four-drawer file cabinet and over \$1,500 annually to maintain it!



CHAPTER ONE

Beginning the Process



Preparation For The Process

Before files are scanned and indexed, the files must be organized into a logical documents. This is a critical process because it will later be what controls the digital file and index structure.

This is defined by one of four document preparation types

Light Preparation

The quickest method, where documents are in good condition and are uniform in size and quality. Assuming the documents are in a “scan ready state”.

Standard Preparation

Files that are in multiple formats and typically bound. Where a letter, report and spreadsheet all would be considered a single record. This is the most common type of preparation.

Structured Preparation

Similar to the Standard Preparation the files are in different formats and sizes but each file type would receive a separate record versus being considered a single record.

Detailed Structured Prep

Files are organized in a subjective way like by groups, subject matter, guidelines, or file type. This requires the a lot of time and energy. This is the most expensive preparation.



“Before anything else, preparation is the key to success.”

- Alexander Graham Bell



CHAPTER TWO

Conversion and Quality Control

Scanning And Indexing

Scanning should occur on high speed scanners with at a minimum of 300 DPI (Dots per inch). The best formats for image quality and for retrieval are TIFF, JPEG, and PDF.

The Indexing part of the conversion process is arguably the most important part of the whole process, since being able to retrieve the file requested in a quick and efficient manner is what the point of document conversion is. The accuracy of indexing is directly related to the source metadata from; barcodes, zone ORC, reference tables, along with other forms. A match and merge process is used to populate index values which relies this metadata from a host system and matching it with a unique index value from the scanning process.



Quality Control

During the Process

Quality Control is part of each stage of the document conversion process. Starting with the document preparation process. During the preparation process especially if your organization is working with a vendor that will handling the document conversion a great deal of client and vendor interaction and training will occur to ensure the project parameters are clearly understood. When the file scanning occurs the images are checked to ensure accuracy, quality, and integrity.



The individuals that are performing the physical scanning work have their worked reviewed to ensure the quality standards are met. During the initial phase of the project , the percentage of document population reviewed is very high to ensure that the indexing guidelines are understood and met. When accuracy levels are met, this task is then preformed on a sampling of the indexer's work. If the sampling doesn't meet the agreed-to accuracy standard, then more samples will be taken, errors are corrected and so on until the standard is achieved.



CHAPTER THREE

Delivery and Accessing



Data Delivery

Project Completion

When the project is complete the images and data will be put into a DMS (Document Management System). If the document conversion project is being handled by a trusted vendor, the images and data will be encrypted and typically mastered to a DVD, portable hard drive, or sent to the client by a secure FTP (file transfer protocol).

The files are mastered in folder structure with filenames containing the metadata and can be optionally provided with a delimited flat file for text based import scenarios. Upon project completion the original hard copy files are securely destroyed and a COD (certificate of destruction) is issued for audit and security purposes.





“Satisfaction lies in the effort, not in the attainment, full effort is full victory.”

- Mahatma Gandhi



Conclusion



Keeping information in paper form consumes space, is difficult to retrieve and is rarely backed up. Converting paper files to digital images allows for your organization to take control and better navigate the highly competitive business environment we live in today.

A document conversion project can be stressful to an organizations resources and typically a trusted partner is needed to guide an organization through the process.

Want a demo? Want to talk to an expert?

Give us a call 800.731.6334 or email us at sales@medimicro.com

SIGN UP TODAY

A Publication of MEDI

www.medimicro.com | sales@medimicro.com | 800.731.6334