How to Guide:
Metrofile’s Digitalisation Process

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Introduction

Metrofile's Digital Transformation Process

One of the key engagements in the Metrofile digital transformation roadmap is **digitising physical legacy content**. This process involves converting paper documents and other physical records into digital formats, making them easily accessible and manageable within the **Electronic Digital Management System (EDMS)** platform.

Why is Digitalisation Important?

In today's business landscape, digitalisation plays a crucial role in **ensuring operational efficiency,** especially when dealing with large volumes of documents. Transitioning to a fully digital operation takes time, but the **long-term advantages make the effort well worthwhile.**

Benefits associated with Digitalisation include:

Improved accessibility: Digitised documents can be easily searched, retrieved, and managed, saving time and enhancing operational efficiency.

Reduced storage costs: By converting information and documents to digital formats, businesses can significantly reduce the costs associated with physical storage and maintenance.

Enhanced security: Digital documents are easier to secure and protect from unauthorised access, loss, or damage compared to physical records.

Long-Term Preservation: Digital archival solutions ensure that crucial information is preserved for the long term, compliant with regulatory requirements.

Eco-friendly approach: Digitalisation helps reduce paper consumption and supports environmentally sustainable practices.

How Metrofile can kick-start your Digital Transformation

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Creating a framework for the digitalisation of physical documents encompasses several stages: preparation, scanning, indexing, storage, and access via an Electronic Document Management System (EDMS).

Metrofile's scanning services are designed to help businesses digitise their paper documents, transforming them into easily accessible, secure, and efficient digital formats. With an established history of **digitising over a billion images over the years,** we ensure your documents are readily available when you need them. This allows you to transform your business with **efficient, secure, and reliable scanning services,** making document management seamless and effortless.

The foundation of the Metrofile digital transformation roadmap is the implementation of an EDMS platform. This platform serves as the **central hub for managing, storing, and accessing all of your organisational data.** EDMS platforms provide secure data storage for all types of documents and files, ensuring that sensitive information is protected from unauthorised access. They also offer **version control features**, allowing organisations to track changes to documents and maintain a clear audit trail. With **advanced search capabilities**, EDMS platforms enable users to quickly and **easily search for and retrieve documents,** enhancing productivity and efficiency. A report by Deloitte revealed that companies using EDMS saw a 30% reduction in document retrieval time and a 25% improvement in productivity.

Preparation

Document Auditing

- Identify the documents that need to be digitised
- Prioritise documents based on their usage, importance, and compliance requirements
- Remove unnecessary files, duplicates, or outdated documents

Document Categorisation

- Sort documents into categories and subcategories
- Create a document hierarchy that reflects how documents will be stored digitally

Document Condition Assessment

- Ensure the documents are in a condition suitable for scanning e.g., remove staples, clips or bindings, and flatten curled or folded pages
- Repair any torn pages
- Ensure that all documents are clean and free of marks
- Small pieces of paper that need scanning should be pasted onto a blank A4 sheet

Scanning

An essential part of your digital transformation, scanning utilises a combination of external hardware and specialised software to analyse, catalogue, and convert physical documents.

Selecting a Scanner

Choose the right scanner based on volume, quality requirements, and document types

Choose a scanner based on your needs (e.g., flatbed scanners for delicate documents, automatic document feeders for bulk scanning)

Setting Scanning Parameters

Select scanning software that meets your requirements, and look for features like optical character recognition (OCR; converts physical documents into fully editable digital copies), file compression, and format conversion (e.g., PDF, JPEG)

Determine the resolution (DPI; typically 300 DPI for standard documents, 600 DPI for higher quality), colour depth (use grayscale or black-and-white for text documents, colour for images or charts), and file format (e.g., PDF, TIFF) for scanning

Scanning

Scan the documents, ensuring that quality checks are in place to catch any errors or misfeeds

Batch Processing: if scanning large volumes, scan in batches to maintain efficiency and organisation

Quality control: check digital images against originals to ensure clarity, completeness and accuracy, and re-scan if necessary

If OCR is used to make text searchable, verify the accuracy of the text conversion, and correct any errors that may be introduced by OCR software

Indexing & Metadata

File indexing and metadata tagging are crucial stages in the process, as they determine how easily and quickly your documents will be found in the digital repository.

Developing an Indexing Scheme

Create a standardised format for naming and indexing files, and arrange the digital files in a logical folder structure for easy retrieval

Decide on the metadata fields that will be used to classify and retrieve documents e.g., date, author, document type, department, or by using keywords to improve searchability

Data Entry

Input metadata for each document, either manually or using OCR technology

Manual indexing involves human input to assign metadata to each document; while labour-intensive and time-consuming, it can be highly accurate for complex documents that require detailed categorisation

Using OCR to extract metadata from your documents automatically can handle large volumes of documents quickly, but may require some manual oversight to ensure accuracy especially for unstructured data

Choosing the Right Metadata for Indexing

Basic Metadata: includes fields like document title, date, and author, which are essential for all types of documents

Descriptive Metadata: provides additional details that make it easier to find and understand the document, such as keywords, summaries, and categories

Administrative Metadata: covers details about the document's creation and management, such as file type, creation date, and access rights

Structural Metadata: describes the structure of document collections, helping to navigate complex documents like books or multi-part reports

Storage

Storage is the backbone of your data management, and ensures that information is available when and where it is needed. Choose between storing your documents in your Private cloud or you can use one of Metrofile's storage offerings.

Storing Documents in the Private Cloud

Cloud Storage Selection: identify a private cloud storage provider that offers the required security as well as compliance features your business needs

Data Migration: safely transfer the scanned documents to the private cloud storage, and use encryption during transfer to ensure data security

Using Metrofile's Storage Solutions

Metrofile offers both cloud-based and on-premises storage solutions

Cloud Storage: using Metrofile Cloud's EverFiles platform provides a scalable, secure, and cost-effective cloud storage solution, and allows businesses to manage and share files seamlessly, with features like encryption, access controls, and real-time document sharing

On-Premises Storage: for businesses that prefer to keep their data on-site, Metrofile offers physical storage solutions with secure facilities and robust records management services

Access via EDMS

An Electronic Digital Management System (EDMS) is a centralised digital platform that organises and manages documents, making it easier for you or your employees to find and access necessary information. Think of the EDMS as the single source of truth for all documentation within your organisation.

EDMS Selection

Choose an **EDMS** that integrates with your chosen **private cloud storage** and supports the indexing scheme

User Authentication & Authorisation

Set up **authentication** mechanisms for users to access the EDMS

Define **user roles and access permissions** to ensure document security

Document Retrieval Interface

Implement **search** and **retrieval** functionalities within the EDMS

Train users on how to **navigate** and use the EDMS for maximum efficiency

Backup & Recovery

Set up **automatic backups** of the digital document repository

Develop a **disaster recovery plan** in case of data loss

Using Metrofile's EDMS offering

Metrofile provides **comprehensive training** and support to ensure **smooth implementation** and usage of our EDMS

Use our **Initial Training Sessions** (to familiarise users with the system's functionalities), **ongoing support** (via helpdesk, **online resources**, and regular updates), and **customized training** (tailored sessions based on your specific business needs and user roles)

Continuous Monitoring & Updating

Monitor System Performance

Regularly check the system's performance and loading times to ensure efficiency

System Updates & Maintenance

Keep the EDMS and cloud storage updated with the latest software versions and security patches

Audit & Compliance

Continuously audit the digital library to ensure compliance with relevant laws and regulations

Feedback Loop

Gather user feedback to make improvements to the system

Conclusion

Embracing the digitalisation process with Metrofile transforms your document management approach from cumbersome to streamlined. By moving through the stages of preparation, scanning, indexing, secure storage, and leveraging an Electronic Document Management System (EDMS), your business can achieve improved efficiency, enhanced security, and significant cost savings. The benefits are clear - better organisation, quicker access to information, and compliance with regulatory requirements. To embark on this digital transformation and unlock these advantages for your business, reach out to Metrofile for a consultation. Let us guide you every step of the way toward a more efficient and secure future.