



Part One: Invest in a Scalable Approach When Addressing Capture Automation

[Capture automation](#) software facilitates the scanning and capturing of critical paper and electronic documents – such as invoices, contracts, receipts and shipping documents – replacing manual processing. The captured content is then archived and organized. But capturing paper – scan to archive – is just the first step and the easiest to adopt. [A recent AllM survey](#) found that for 72% of organizations, scanning paper is still the most important part of their information capture strategy.

Many organizations are still evolving from a focus on scan to archive, to one focusing on scan to process. Capture automation is tightly connected to this evolution. A core challenge that many organizations have today is to move beyond a focus on scan to archive. While eliminating paper and digitizing is a necessary part of [digital transformation](#), on its own, this is no longer enough to truly transform your business processes.

The reality is that [capture automation](#) software can be so much more than just scanning paper. Depending on your organization, you can determine how you want this software to work for you. Customize by simply integrating with a desktop scanner or multifunction printer for releasing documents to your file system, or route your documents, extract [unstructured data](#) and even incorporate capture automation within dynamic [web forms](#). The key is for organizations to take basic capture capabilities and extend them as part of their broader transformation strategies.

To help you get started, we have generated a list of best practices to consider when deciding where capture automation fits on your [digital transformation](#) journey.

1. Identify sources of information you are scanning to process – such as paper, email, digital documents (Word and PDF files).
2. Weigh the pros and cons of managing digital information – determine what to capture, how dynamic is the information and how does the format impact the capture process.
3. By department, identify specific types of content to capture and determine how to capture them – using a desktop scanner or MFP, releasing to a file system or document management system.
4. Differentiate between structured and unstructured information and identify the differences in how they are managed.
5. Determine an approach for capturing structured data – such as electronic forms.
6. Initiate a process for capturing content – what to capture, what approvals are needed.

To learn more about what capture options are available to you – from basic scan and archival, to advanced [data extraction](#), check out Square 9's solution for capture automation. Also, stay tuned for other items to consider while on your digital transformation strategy journey.



Marketing Communications Specialist **Alexa Pritchard** is the dynamic voice behind Square 9 Softworks. Delivering highly effective messaging across reseller channels, end user communities and outside agencies, Pritchard develops, drives and executes communication plans that effectively support Square 9's overall marketing goals and objectives. To learn more visit www.square-9.com.