Robotic Process Automation - Ideal for Document Management?

We have all heard that the Robots are coming, most of the examples given for using Robots are automating tasks that copy / verify data between IT applications.

Ether Solutions thinks there could be another use of Robots and that is to get to the things which we all have on our "To Do" list and never quite get around to completing.

The particular scenario in the Document Management world, is that most people create and amend documents as part of their day to day business, but how many of those documents are "perfectly" filed and "tagged" with metadata for subsequent discovery? There is a tendency to do what worked before and think about putting an entry on the "To do" list to look at it again when there is time.

Most people get frustrated by searching for documents that they know / believe should exist but do not immediately appear when browsing in the expected folders or in the first page of search results. This frustration can lead to extensive effort to discover the document or in the worst case scenario, information is re-assembled to create an alternative document.

In the many years of Ether Solutions working with clients to implement document management solutions, the conversation about how to get people to file documents correctly and how to assign appropriate metadata tags occurs repeatedly. The challenge is of course that people who create and amend documents are busy, often under pressure and they know what they are doing. Classification techniques for documents and careful use of security permissions often help collate documents into the right group of folders. An approach Ether Solutions has often discussed with clients, is that if the allocation of metadata values and file location is very important, the engagement of a full time librarian can deliver benefits. Such individuals do not need to be experts in the contents of the documents, they just need to know how to tag it effectively and consistently using an agreed taxonomy for metadata. Such people are motivated to keep things "Neat and Tidy", so they are motivated to add the value to the storage of the document.

For most organisations, the concept of employing a librarian is not an option, so a "make do" level of document filing and document tagging is used. Looking at the "Shared Network" drives in most organisations will tell you how successful that approach is in reality. Even those with a potentially structured document management implementation will admit that over time the quality of the solution to discover documents degrades.

What about a Robot Librarian?

A Robot Librarian could not make sophisticated judgement calls of a highly trained human but if a Robot consistently applied a set of set of rules for metadata, it would deal with the majority of documents and importantly re-evaluate documents after updates. This would reduce the task of metadata allocation and filing to be carefully considered only for the exceptions. In such a scenario, It might be practical for a small number of documents to be manually reviewed.

A Robot Librarian would not be a direct replacement of human activity, but it could significantly improve the quality of document searching and discovery to avoid a lot of frustration. Such process automation has to be welcomed. Alexa and Siri might be fun to speak with but a Robot Librarian would be great to remove frustration rather than something to shout at.