Automated Records Management – driven by AI

Why are your employees still sorting documents—when AI can do it in seconds?
Manual processes drain time, patience, and quality. In contrast, AI-powered records management brings order to chaos: automatic separation, intelligent classification, and interactive tables of contents transform any batch of documents into a searchable knowledge base. Fully compliant, low-maintenance, and ready to deploy in no time.

Discover how the IDA Platform from PLANET AI can streamline your records processing.

Reduce manual efforts
AI-driven document classification and separation

Instant access to critical information
Automatically generated tables of contents

Accelerate time to value
Minimal training required, e.g., for new document types

Ensure regulatory compliance
On-premises or private cloud deployment options

COMMON CHALLENGES

Digitalization is typically the first step in records management. Organizations often receive records as long, scanned PDFs that are not machine-readable. This forces many to rely on **manual data entry**, as well as s**orting and splitting files using barcode-based blank pages**. These outdated methods consume valuable personnel resources that could be better used elsewhere—and can lead to processing bottlenecks.

Many existing solutions rely on **rigid rules** to automate parts of the process. Maintaining and

updating these rules is complex but necessary—especially when regulatory requirements or document layouts change.

Ultimately, manual or rule-based document handling doesn't just reduce operational efficiency, it also drives up storage costs and increases the risk of unauthorized access to sensitive data due to misclassification. In the worst case, it can lead to regulatory non-compliance.

THE SOLUTION

PLANET AI's IDA Platform offers two options for intelligent records management:

1. **Trainable classification and separation:**
    Leveraging trainable AI models, IDA performs high-accuracy document classification and separation—without relying on complex rule sets. Even large, multi-document files are accurately split into individual documents, reducing manual effort and maintenance.
2. **AI-generated tables of contents**:
    Using Large Language Models (LLMs), IDA can automatically create structured, interactive tables of contents—enhancing document transparency and enabling faster access to critical information.

IDA adapts to various IT environments and business needs, with support for both on-premises and private cloud deployments. It also delivers exceptional OCR performance, including for challenging inputs like handwriting or historical scripts—ensuring high-quality data for downstream processes.

HOW IT WORKS

IDA workflow for records management:
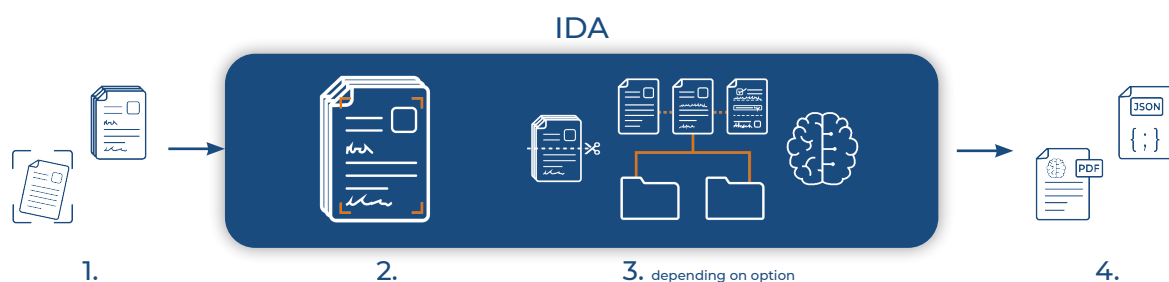
1. Input: Scanned PDFs or image-based files

2. Recognition:
Industry-leading OCR for handwriting, print, and historical scripts

3. Processing:

Option 1: IDA Classification
- Automatic separation of long, multi-page documents
- Rule-free classification via trainable AI models

Option 2: IDA Understanding
- Automated generation of a table of contents using a specialized AI agent

4. Output: PDF oder PDF/A (all conformance levels) with text layer containing recognition results and/or JSON with metadata (e.g. table of contents), including positional information and confidence score

CUSTOMER SUCCESS STORY

Efficient records management is essential across many industries, from legal and HR departments to healthcare. In the healthcare sector, the standardized Clinical Document Class List (Klinische Dokumentenklassen-Liste / KDL) is a crucial tool.

Our renowned client has been offering **scanning services** to healthcare providers for over 50 years. Regulatory changes necessitated a **significant expansion in document categories**, growing the file plan from approximately 150 to over 300 classes. IDA's rapid and accurate adaptation to the more granular document classes allowed the client to meet the requirements quickly. Moreover, implementing the few-shot learning approach led to an **80% reduction in manual efforts** due to increased straight-through processing.