

Every Cloud has a Silver Lining - Especially with Document Management

As many organisations strive to reduce the quantity of paper files in the office, an increasing number of powerful electronic document and records management solutions have emerged for workflow and filing efficiencies. There are powerful solutions for integration in Accounts, Human Resources, Customer Relationship Management, Mailroom, Form Filling and many other business functions for the management of records. There is usually a variety of customisable workflow modules that are offered as 'bolt-on' options to document management solutions designed to seamlessly integrate with current systems and meet specific departmental needs.

Document management plays a crucial role in any business or organisation, whether large or small, or public/private sector. Even a relatively small business will generate significant amounts of paper records over a period of time. There are of course legal document retention obligations and a necessity to have access to certain records irrespective of business size. And of course, the larger the organisation, the more formidable the task becomes for efficient archiving and document management. Information Commissioners Office has formidable powers with the capability to fine organisations for not adhering to the Data Protection Act with many high profile fines having been imposed over the last 2 years.

There is also the problem of human error where paper documents are concerned. They are susceptible to being mislaid (or worse still, inadvertently destroyed). And of course, they take up valuable office space which could be used more productively. Even the most efficient in-house paper archiving systems can be time consuming and labour intensive when file retrieval is required. Duplication of tasks is commonplace. Furthermore, organisations with multiple sites have limited ability to share and access information between departments or locations.

Electronic Document and Records Management (or EDRM as it is known) has many efficiency, compliancy and security benefits, while helping to introduce a culture of best practice when it comes to managing documents. EDRM comes in a variety of guises to either totally replace or reduce traditional physical documents with electronic procedures. Some are restricted to only managing digital content whereas there are a limited number of solutions which address the management of both paper and electronic records.

To some this transition can appear daunting, not to mention expensive. But thanks to modern technology, this doesn't have to be the case. There are specialist document management partners who offer a variety of solutions that are user-friendly, relatively quick and hassle-free to implement, and deliver swift return on investment. In fact, return on investment can be significant with the right document management support in place, often within six months.

There is a wide range of EDRM software available, some developed for a variety of specific tasks but the downside to this, can be the cost of individual user licenses as well as an increased need for new or additional hardware. IT support, training and upgrading can also represent further ongoing costs.

This is where the much talked about Cloud Computing comes into its own providing web hosted Software as a Service (SaaS) solutions, removing the need for individual user licences and allowing for secure remote access from any location. SaaS uses the internet and runs off secure servers from a third party location meaning that businesses do not have the headache of server maintenance and monitoring, or the worries of adequate firewall security. The service provider is responsible for this.

Hosted document management can be up and running in a matter of weeks, as opposed to months; the latter of which can disrupt the workplace and hinder productivity. Many of these document management solutions run on the principle of intelligent scanning and image capture that are stored/retrieved as required with added features for customised business processing/content management for better control and workflow efficiencies.

There are many associated advantages derived from adopting electronic document management. Users have immediate access to information without wasting time burrowing through filing cabinets to find that crucial document. Moreover, that information can be accessed from multiple locations via the internet for improved control and efficiency.

Protected access for authorised users and reduced movement of paper files improves security and confidentiality. Robust document management provides an accurate record of historical information linked to the file for greater accuracy and duplication avoidance, as well as a comprehensive audit trail. It is important to ensure that the document storage format is non-proprietary due to fast changing data storage standards; PDF and PDF/A is widely accepted format and also ensures a single version of the document.

Offices can reduce their in-house storage space required for paper files and of course, there are many environmental benefits through a reduction of paper to be gleaned too.

For some businesses, a total 'paperless transition' is a bridge too far. That is why many specialist document management partners offer an integrated service, very often termed Hybrid Document Management. This incorporates both electronic and paper based document management. These solutions combine outsourced secure paper document storage with a 'Scan-on-Demand' service that digitizes a document. The digital image is then uploaded to a secure web-hosted server ready for immediate 'password protected' remote access. This helps to reduce the cost of converting all document back files to digital format, very often making it viable for businesses of all sizes.

Outsourced document management specialists can handle the complete lifecycle of a document from archiving and storage, to ultimately secure destruction upon a client's instruction.

So, if you've not thought about it before, it's time to phase out paper and embrace electronic for cost-effective secure management of document and records.