TOSHIBA

Whitepaper

A Guide to Document Management

Would your business benefit from a document management solution?

Is your organisation looking for leaner, more efficient data and document workflow?

Do you worry about the safety and security of your documents?

Do you find it hard to locate the information you need?

If you've answered 'yes' to any of these questions, a robust and flexible document management solution will offer big benefits to your business. But what are the things to look for when selecting a solution, and what exactly are the benefits of automated document management?

Today, small and medium businesses typically have complex document workflows that involve seemingly endless hours of scanning, mailing, saving, approving, collating, archiving and filing documents, in both paper and digital forms. Processes as diverse as setting up and maintaining customer and client records, producing quotations, placing orders, making deliveries and issuing invoices all generate huge amounts of paperwork.

These processes occupy many hours of administrative work that dramatically impact business efficiency. In fact, research has shown that the average employee spends between 30 and 40% of their time looking through email, paper documents, shared hard disks and filing cabinets trying to find information they need to complete their tasks[1].

All too often, documents are stored in numerous different locations or even on different sites, making them hard to locate in a timely manner, which can lead to unexpected expense. Letters left in someone's in-tray, documents that require signature when the signatory is out of the office, original documents forgotten on the printer, scanner or photocopying device– all of these might be virtually inaccessible.

Even documents in the digital realm pose problems for increasingly mobile teams of workers who must collaborate on projects: keeping track of document versions and each team member's individual contributions can be challenging. Additional challenges can occur when looking at linked documents such as purchase orders, invoices, payments requisitions etc. Not having the correct documentation to hand or not being able to locate documents can often have a negative impact on payment terms and supplier relationships. The introduction of a document management system can resolve these issues, ensuring that all documents in the paper trail are linked and can easily be retrieved.

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[1] Reference: www.docuware.com

What are document management systems?

Intelligent document management systems (DMS) are electronic systems that have been specifically developed to help organisations improve workflows and optimise internal processes to meet their own specific needs. DMS deal easily and efficiently with e-mail attachments, invoices, bills of materials and virtually any other type of document, transforming them into valuable assets that are all securely stored in the same place – the central document pool. In short, a DMS offers a robust, reliable and secure solution for SMB content management.

Easy-to-use functions and a high level of automation make short work of indexing and organising documents, which means that workers can instantly find and retrieve any piece of information they need, anytime, and from any location. Whether these are letters, faxes, records, emails or drawings, the DMS stores them all in the central document pool, and this integrates seamlessly with the organisation's workflow.

E-mail correspondence, letters and even phone calls exchanged with the customer can all be stored in the central document pool. So, when there's a need to check the details of an order or the customer asks a question, all of the necessary information is readily available. Simple searching and fast retrieval of documents are the hallmark of a good DMS. Better yet, every authorised user has access to the documents from the convenience of their own workstation, or mobile device. This means that organisations operate more smoothly and more efficiently, providing better service for their clients and customers.

What are the benefits of a DMS?

A key benefit of a DMS is that, thanks to its structuring and automation capabilities and its accessibility, it keeps managers and other authorised staff members "in the picture" all of the time. It can give a clear, comprehensive and reliable overview of what's happening with any business process in seconds. The virtual folders created by the system organise all the relevant documents, making it easy to find and view them at a click of a button – whether they were originally drawings, photographs, paper-based notes and records, electronic material, or e-mails.

Another important benefit is remote access. With the current trends toward flexible working environments, hot-desking and multi-site operations, remote access is no longer optional – it is an essential requirement. An effective DMS is the best way of meeting this requirement. It will allow employees to conveniently access and upload crucial data wherever they are – working from home, on a client's site or even working on their mobile devices in an airport departure lounge!

A DMS will also help optimise the internal workflow of the organisation using it. Let's look at the example of purchase invoice approval; without a DMS, paper invoices are forwarded manually and they stay in the in-tray of an employee until they have time to deal with them. Invoices for approval via DMS are forwarded electronically, which means they can be accessed by the cost-centre manager – wherever he or she may be – and quickly approved with a digital stamp.

In addition, using a DMS for invoice handling allows all authorised employees instant access to see the status of the invoice, which greatly improves traceability and transparency, as well as virtually eliminating the possibility of invoices getting lost or misplaced. And the benefits a DMS offers for invoice handling also apply to every other type of document organisations rely on.

With a well-implemented DMS, paperwork is quickly scanned and securely saved. Documents that are already in an electronic format such as PDF, JPEG or CAD can be imported easily via drag and drop functionality. E-mails are automatically stored from the e-mail client programme and indexed with keywords that include the subject or recipient.

For each document keywords are automatically assigned, and are subsequently used to make locating and retrieving documents faster and easier. Powerful tools are provided for version control so that users can always be sure that they're working with the latest version of a document, but can easily look back to earlier versions should this be necessary.

A good DMS also provides greatly enhanced document security. Because documents are stored digitally, they are intrinsically protected against loss and theft, as well as against perils like water and fire damage. Perhaps even more important, data integrity and security are also assured. This is essential for the many organisations that handle sensitive information and need to comply with the Data Protection Act and to observe legal submission times when required.

Seven things to ask a prospective DMS provider

1. **Which areas of my operations can be improved with a DMS?**
   An experienced DMS provider will be able to present detailed benefits that relate to all the key operational areas, including – but not limited to – accounting, human resources, sales and marketing, purchasing, manufacturing and quality control.

2. **How will the DMS integrate with existing systems?**
   Your provider should be able to offer a smart DMS that will integrate easily and seamlessly with almost any type of business IT system, including CRM and ERP systems.

3. **How safe is my data when I use the DMS?**
   Look for factual based responses and examples that explain how the DMS guards against data corruption and loss, as well as against unauthorised access and tampering. But be sure that the measures proposed won't unduly impede access to the documents and data when needed by authorised users.

4. **How much will it cost?**
   Nobody likes hidden charges, so ask the prospective DMS provider to detail the total cost of the system you're being offered, including any licensing fees, applications costs, outsourced process spend and on-going storage charges. Remember that low first cost is not necessarily an indicator of low total cost of ownership.

5. **How will the DMS streamline my organisation's operations and improve communication between departments?**
   Make sure that the prospective DMS provider has a clear and documented roll-out plan for ensuring that the system will provide smooth and seamless inter-departmental communication. Remember that even if the initial implementation will cover only a few departments, it's essential to have the peace of mind of knowing that, should it be necessary to expand the scope of the DMS in the future, this can be done easily and cost effectively. In addition, DMS can also protect and ensure that information is not lost thanks to its disaster recovery abilities.

6. **How scalable is the proposed system?**
   Most organisations expect to grow in the future and, in the commercial sector particularly, the installation of an effective DMS can give this growth a big boost. It's essential, therefore, to choose a DMS that can grow with the organisation. Find out from the prospective supplier how well their system could cope if, for example, your organisation added new sites, expanded the range of services it offered, or simply doubled or quadrupled the volume of documents it needed to handle.

7. **How well does the system support remote and mobile access?**
   With an increasing number of organisations adopting home working, hot-desking and other flexible working schemes, employees need to be able to access documents at any time and from any location, ideally using their existing hardware such as laptops, tablets and smart phones. A good DMS supplier will be able to demonstrate support for remote and mobile access, and also explain the security features that prevent these facilities being exploited by unauthorised users.

Helping you to achieve your development goals

A robust DMS will adapt to any organisational structure and will offer an efficient and cost-effective solution for any size of operation from the smallest start-up business to the largest public sector body or multinational company. It will also offer the flexibility and scalability needed to support organisations through every stage of their evolution and growth.

Reducing paper usage is essential for many SMBs and has been identified this as a potentially important development goal. Often, however, they are deterred from moving forward because of the amount of time and effort they believe will be needed to eliminate paper from their operations.

The potential rewards are enormous. Content, processes and procedures are transformed to create a valuable resource that allows the organisation to increase the efficiency of its operations. This resource also provides managers and directors with ready access to the information they need to control the organisation effectively – and to plan its future growth.

Crucially, these are not just empty promises. According to the Association for Information and Image Management (AIIM), 46% of companies that adopt an enterprise content management strategy report positive ROI within 12 months, and two thirds do so within 18 months[2].

Shouldn't your organisation join those that are already enjoying these benefits?

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– AIIM

[2]*Reference: www.docuware.com*

Glossary

Central document pool   A centralised library of files containing all of an organisation's documents and assets – such as invoices, faxes, e-mails, images and even videos – in electronic form.

Traceability   The ability to positively verify the history, location and status of a document.

Indexing   The process of creating a searchable database of key terms within documents, as an aid to locating the documents and the information they contain quickly and reliably.

Workflow   The definition, execution and automation of business processes where tasks, information or documents are passed from one participant to another for action, according to a set of procedural rules.

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