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Building a Document Management Plan Part I

By Ray Griffiths

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Document imaging is a document management tool which can increase your productivity, reduce your document management costs, provide enhanced document security and assist with compliancy issues. Because document imaging can do so much, yet is so simple to learn and use, you may be tempted to go "on-line" with a system without first developing a plan. Don't

Often the tendency is to call in several document imaging vendors and have each of them tell you what they think you need. After a lengthy process of each vendor gathering information and presenting a proposal you are not ready to make a decision because:

- * The cost is more than you anticipated and there does not seem to be an ROI to justify the system.
- * The project is overwhelming and your resources to get it done are very thin.

You can eliminate the above scenario if you gather some information and put together a plan. Before you contact any vendors you need to resolve a number of issues. This article addresses these issues in the form of questions to be answered. Some of the questions will not be relevant to your situation.

The first issues concern funding the project. If the funds are not going to be available even if the project looks good, there is no need to proceed.

1. Return on Investment (ROI).

- What is company policy requiring an ROI?
- What is the standard payback period?

2. Does this project need to be budgeted?

3. Which department's budget will fund the project?

4. Does the department that will fund the project have total buy in?

5. What are the preconceived costs of the project?

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6. Could the price tag on a system be too high even if the ROI meets company standards.
7. At what level can the project be approved?
8. Do you have the infrastructure to support a document imaging system?
 1. If not will that cost be included in the cost of the imaging system

The following is a commentary on how companies build their ROI. Accounting is where most companies find the best ROI.

A document imaging system in accounts payable will have good ROI if some or all of these conditions exist:

1. There are 5 or more payables clerks
2. They are manually matching checks
3. Invoices have to be approved after they are received.
4. Receivers are being printed and sent to accounting.
5. Some payables become receivables.
6. You process hundreds of invoices every week from the same vendor(s)

Much of the processing in accounts payable can be automated to some degree by using document imaging technology. When you invite consultants or vendors in you need to have an idea what you expect to accomplish to be sure that they are going in the right direction. Evaluate the process and determine if document imaging will provide a good ROI.

Accounts receivable is the best ROI for many companies. Good customer service and reducing outstanding receivables days is a challenge for any organization. Document imaging can be a tremendous help in improving customer service, reducing receivables days as well as reducing bad debt because:

1. You have better control of your proof of delivery documents.
 1. They will be in the system faster
 2. You know if one is missing at the end of the day so you can do something about immediately.
 3. Once they are in the system you will not lose them.
 4. You can retrieve them instantly.
2. All customer documents relating to a transaction can be retrieved quickly to answer questions and resolve issues.
3. Imaged documents can be emailed or faxed from the imaging system.

Again you need to look at your current process and determine, if you automate the POD process, will there be a good ROI.

Other areas where document imaging will help provide an ROI:

- * Sending MSDS sheets with product orders
- * Work orders
- * Manufacturing documents

- * Quality control
- * Sending certifications with product orders

In my early years in the business I would work with a company and not ask the money questions. I soon found that if the company had not answered the money questions it was difficult to get a sign-off, and most of the time the project would die. When I work with a company today these are the first issues I deal with. I know that most organizations have a need for document imaging and many of these organizations have an easy ROI.

If the funds are available, proceed to the next set of issues.

1. Who initiated the project?
2. What problem(s) are they trying to solve?
 - * Define the problem(s)
 - * How will document imaging solve the problem?

3. Are there other departments in the company that are interested or are there other departments you think will jump on the band wagon once a system is in place?
4. What other departments in the company should be involved.

Who initiated the project can often be the key to the success of acquiring a document imaging system. If a high level executive is championing the project it will be easier to get approved.

In some cases the problem(s) will insure that a system will be installed, if it will solve the problem, regardless of the ROI.

When you invest in a document imaging system your goal should be to leverage the system to the fullest extent. So it is important to look for all the areas that can benefit from document imaging technology. To do this you need to understand document imaging technology and how it can be applied. That will be covered in the part 2 of this series of articles.

Almost any company that can justify a document imaging system will have several departments that will be able to use the system. But, (there is always a but) do not try to solve everyone's problems with the initial project. It will become too complicated and overwhelming and nothing will get done. Pick one area like accounts payable. Once that is up and running move to another area.

Part 2 of this series will discuss how document imaging technology is used to solve some of the most common problems.

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Top Filing Systems: Go Digital!

By Trevor Marshall

If you are one of those people who have ever accidentally lost or spent far too much time rifling through drawers for that particular file, you may be interested to know that modern technology can change your unorganized drawers full of paperwork into digital format, with many added benefits.

1. The Benefits of Digital Format:

– Files are easily distributable – Files are indexed perfectly and are incapable of going out of order – Files are searchable – Can be easily backed-up and restored

Q. How Can I Easily Convert All My Paperwork Into Digital Format? A. All you need is a good document management system that will ensure you have the luxury of finding the correct documents that you need in just a click of a button.

Q. What Is A Document Management System Exactly? A. You install an application to your personal computer that will give you the option to categorize your files according to their type as well as their contents. This will really make your recordkeeping a breeze.

Q. I Am Organized Enough Already, What Benefits Will This System Have For Me? A. Aside from being able to keep track of your electronic documents, you might as well take the time to scan your paper documents to your computer to have an electronic copy of them as well.

>From scanning paper documents onto your computer, you can also retrieve various other electronic documents from the internet or from other people's files (if your document management system is for a business where the system is shared by everyone in the office). Just simply use the drag and drop system for you to be able to put your electronic documents to its proper folder.

1. Standard Edition

The doQuments Standard edition is meant for home and personal use. It is the simplest among the three document management formats and is a quick and effective solution for managing all your electronic and paper documents. There is also the doQuments Professional edition which is a document management system that is meant for the upkeep of files in small scale businesses.

2. Professional Edition

With this version you will now be able to do more things with your document management system. This document management system is faster and allows a larger database. It also contains a nifty feature called parameterized queries that ensures you can locate specific documents in just a few clicks.

3. Enterprise Edition

Aside from combining the features of the professional edition, the enterprise edition also allows a web edition where you can connect the program directly to a server (a website or intranet system). Now you can access your data from anywhere in the world that has an internet connection.

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