



My Bit: Managing Your Documents For You. By Sukhdev Singh, The Week Of November 4, 2003

In my first article last week, we looked at the problems associated with managing documents and how companies that AmberSoft has worked with realised the benefits of managing all their information, helping them turn clutter into competitive insight and document overload into information at your fingertips. This week, let us explore how this is done.

At one time, electronic document management was very simple - microfilm. Documents were transferred to microfilm and archived, with the idea of preserving the document while saving space.

However, for businesses today, thinking of document management as only a storage option is too limiting. They should be looking to do far more than simply store documents on magnetic media like microfilm.

What businesses want is the ability to also manipulate data. They also need to be able to store and retrieve documents quickly. For other documents, they may need to be able to tag and index the information and then to share it with different functions of the business, often across distances and platforms. While sharing this information, they also need to control access by limiting the power to make revisions, and to track the revisions made. Lastly, firms need to retrieve information in a form that will aid in decision-making at different levels of the business.

In our experience, we have discovered that the industry is littered with customers unhappy about the document management implementation they commissioned because the solution did not meet their needs.

Document management vendors are known to sell solutions that do not address the needs of the organisation purchasing the product. It should be noted that there are many document management products being sold but none of the technical features will manage your documents for you. They are only technology tools to make the management of documents easier. Factors that affect the successful implementation of document management are:

- People. They carry knowledge about the documents. How they manage, use and organise information will have an effect on the strength of the document system.
- Business processes. This often pre-defines the organisation and the flow of documented information between people, within and outside the organisation.
- Market requirements. Whether we are talking about employees, customers, suppliers, regulators or industry standards, they all have a significant impact on the decision-making process. They are also often the target audience for the managed documents.
- Funds. The cost of purchasing technology, introducing it to the organisation and managing its day-to-day operation versus the benefits of not having a document management system. What will it cost you to do nothing?

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In planning for an effective solution, it is imperative that some guidance and help be provided to put the customer on the road to electronic document management. A client like Koperasi Tentera, which provides for its members a loan scheme, insurance, scholarship, housing and contributions, might have different document retrieval requirements from, say, Majlis Bandar Shah Alam's Jabatan Pembangunan. The product used in the end might be the same but the implementation and approach may vary according to their needs.

A good solution provider will address all the above issues and more to discover the pains and problems that the customer needs addressed to enhance its business processes, as we have done with both the above and many other customers. With proper implementation and guidance, organisations can enjoy the following benefits:

- Making your staff turnover-proof. Staff may come and go, or be on leave, but your business does not grind to a halt. Everyone will still have access to all the documents they need to perform their functions.
- Eliminate expensive human filing mistakes. Organisations can literally spend days trying to locate wrongly filed documents. A powerful search feature allows users to find any document in your organisation instantly -without leaving their desks. No more searching in cluttered storerooms, dusty filing cabinets, or on colleagues' worktables.
- Increased access to essential information. Access multiple documents containing related "critical" information instantly. Staff can share documents with colleagues on the network, allowing them to process documents instantly, effectively and cheaply.
- Reduces the cost of storing paper documents. Typically, the law requires a business to save documents anywhere from seven years to a lifetime. The annual cost of storing legal documents can be reduced by storing at cheaper locations while still having the data available online.
- Off-site storage protection. What happens to your business if you have fire or water damage to paper documents? Electronic data can be easily backed up and stored off site so that important information will not be lost.

The most fundamental starting point in information management is for an organisation to get its paper documents digitised in a useful manner, allowing users to access, organise and work with different important related pieces of intellectual content. Without these capabilities, companies cannot be on a technology-supported road to document and knowledge management. It is important to note that such tools are currently available in the marketplace and are within the reach of smaller companies that were left out in the past as they could not afford them and did not have the ability to tap into the benefits of such a system.

With the increasing cost of managing paper and the critical nature of handling information-related processes efficiently, implementing smart and efficient paper management is no longer a question of "whether", but of "how" and "when".

Sukhdev Singh is the chief technology officer of AmberSoft Sdn Bhd, which specialises in document management solutions.

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