

Ask the Expert...

By Jay Moore

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Document management is a buzz word that you hear around the office in this age of information technology, but most people cannot come to a consensus on exactly what “document management” really means. In a generic sense, document management can be anything from a shoebox full of receipts to a sophisticated computer with a lot of cool software that lets you run a large office without printing a single piece of paper.

To illustrate a couple of scenarios, Dan the electrical contractor buys some supplies for a project at Wabash Valley Electrical, stops to get gas on the way back to the house that he is working on, and then buys a new drill bit at Paitson Brothers Hardware. Dan just got three receipts that he needs to keep and give to his accountant when it comes time to file his taxes, but what does he do with those receipts? He goes home sits down at the desk in his home office and files them into a drawer, file, or shoe box with all of his other receipts. Dan doesn't really need a complicated computer set up to keep track of these documents so that box or drawer is his document management solution.

On the other end of the spectrum, there's XYZ Corporation. They have five hundred employees and generate a lot of paper in order to conduct business. They have printers in Human Resources, Accounts Receivable and Payable, Customer Service, Management offices, the Warehouse, in their Production Facility, and – well you get the picture. Since they are printing documents in all of these different areas, they also have file cabinets everywhere. Management, realizing that Accounts Receivable needed access to the documents in Customer Service on the other side of the building and to the Warehouse on the other side of town, just spent \$50,000 on new software and hardware to let them scan and store electronic copies of everything from gas receipts to signed proof of delivery forms and to import documents into the system that were already in electronic form without having to ever print them. They are going to see a return on their \$50,000 investment in less than two years because of the savings in printing costs, filing cabinets, and man-hours to retrieve documents from said filing cabinets. Document management is starting to sound very complicated and very intimidating, but it doesn't have to be that way.

The reality is that most businesses in the Terre Haute area use document management on a day to day basis in the form of filing cabinets, most businesses do not have an unreasonable amount of paper to store, and most businesses are used to the way their filing system is set up. The key to any document management solution is finding things.

You have a nice logical set up to your filing cabinets - alphabetized, account numbers, dates, etc. If you ask your office manager or administrator for a certain file, they are so familiar with the filing cabinets that they can produce any given file in a matter of minutes. But what do you do if you want to cross reference files alphabetically and by account number? What happens when one of your files gets accidentally placed in the wrong folder or cabinet? Although we are used to filing cabinets, they definitely have their limitations and drawbacks. Enter *electronic* document management that is simple enough and scalable enough for Dan or XYZ Corporation.

For more information on the Alchemy document management solution by Captaris, please contact Jay Moore at CDS Office Technologies.