

1 What is Electronic Document Management?

Understand what Electronic Document Management really is about? Learn about what types of technology you should consider when looking to manage the unstructured content that is growing exponentially within your organisation.

2 Should it be a priority?

Why should you care about technology to manage business documents now? Why should the organisation consider this to be a strategic necessity and should I move Electronic Document Management up the priority list for investment?

3 When is the right time?

So, I'm convinced I should be doing something about managing all this unstructured content, but when should I be looking to implement? Should the organisation implement in one go or move sequentially to prove each solution first?

4 Hard to deploy, implement and manage?

Electronic Document Management is complex isn't it? How can I successfully implement such technology, especially as it is likely to be needed in different departments and business functions over time?

5 So where do you start?

Assuming you're convinced that your company will benefit from the implementation of an Electronic Document Management solution, understand what approach should you be taking towards your first step.

6 Finding the right resource?

The Who? Can we implement the solution internally or do I need the support of a supplier? Finding the right resources will help to understand what sort of external advice will be available to help your organisation achieve key objectives.

What is Electronic Document Management?

one **1**

All information can be classified and in business is frequently referred to as Fixed or Unstructured Content. Fixed Content describes information in its final form that cannot be changed such as a customer invoice, product design or even a Legal contract. As an organisation becomes more concerned with storing, managing and obtaining rapid access to their information, Electronic Document Management (EDM) is used to provide strategies and solutions to help:

- (1) Control and leverage this Fixed Content as an asset,
- (2) Manage its risk as a liability, and
- (3) Reduce the costs of keeping it.

EDM enables the capture, organisation and delivery of fixed content images, documents, reports and other business critical information. Meanwhile, Information can reside as Unstructured Content in many paper and digital forms, file types and formats and is captured and managed across your organisation through EDM for one purpose – to leverage the knowledge contained for competitive advantage.

Should it be a priority?

two **2**

Content within an organisation grows at anywhere between 65% and 200% per annum depending on your industry sector. EMC sponsored research recently concluded that 800MB of data or content was produced in 2002 by every man, woman and child on the planet!

At a time when strong IT governance, regulation and compliance are realistic business issues, many are already drowning under a sea of content. When unable to classify it, place a value on it, review or control it the organisation is unable to tie it into a business process and audit changes.

Business challenges continue to set priority for many of our existing customers. In one example alone the customer found managing a growing volume of paper records and ensuring field employees have easy and quick real-time access to this information was a major factor. Add the challenge of a new office or a goal to embrace technology and dispense with cumbersome filing systems and your transition to an Electronic Document Management system becomes more than a priority – it becomes critical.

Electronic Document Management provides an infrastructure to allow you to get content under control and use it to address line of business challenges you face as an organisation today.

When is the right time?

three **3**

Getting your content under control is necessary but must be prioritised against other IT investments.

A great way to assign this is to consider the 3 C's;

Compliance Is the business driven by legislation or regulation regarding content stored?

Consolidation Is the business driven by high service level at the lowest possible price?

Collaboration Does the business want more efficiency through collaborative endeavour?

You may simply need to find a better way to manage paper-based information traditionally stored in files and cabinets. From reducing the amount of 'lost' documents through to providing a solution to store, manage and access information "on-demand", getting Fixed Content under control within the organisation should set the agenda for your decision to go ahead.

One of these may seem an over-riding imperative to you but consider that others within your organisation may have different priorities.

Hard to deploy, implement and manage?

four **4**

Electronic Document Management is not a one size fits all kind of technology as in each case the criticality of the application varies. The growth of managed content within your organisation will dictate the scale of the applications you choose – The importance of evaluating your suppliers should not be underestimated.

Try to understand the flow of content within your own company. This "Content Value chain" establishes where the content is first created, maps the business process and where it crosses departmental or functional boundaries. Once mapped, the business process can be used to create an impact analysis report on points of integration required as part of the solution.

Not all Electronic Document Management should be complex. Out-of-the-box, easy-to-use-and-deploy solutions such as ApplicationXtender can be deployed in a matter of hours with little to no custom coding or programming! To be truly effective the solution should require minimal amounts of IT support and on-going maintenance to implement and manage the electronic system.

So where do you start?

five **5**

One of the first things to do is identify the most critical areas of investment using the 3 C's as a guide. Look at what will provide you with a solution in the long term but can be implemented in easily segmented stages.

Remember that other factors within the organisation may drive the timescales for implementation. Some factors create defined deadlines such as a physical lack of storage space for volumes of paper filing or taking the decision to move to larger premises. Evaluate as far as possible to find the optimum time to begin your project.

Next you have to scale your solution to match the business. It is highly likely that you will consider this solution in more than one business area over time and gain from leveraged content across systems. If using different EDM components you will face integration challenges, and most likely, significant extra cost, so address it before it becomes a bigger problem.

Finding the right resource?

six **6**

The level of resources required to successfully implement Electronic Document Management technologies in your organisation will depend on the scope of the initiative. However one of the goals of EDM vendors is to create intuitive and easy-to-use applications with much of the complexity hidden from the administrator and user.

A departmental implementation may not require much more than an administrator assigned to implement the system. Installation software eases the burden of implementation and since most of the client interfaces are web based, there is little need to roll out to users.

The key issue is more likely to be training and education to encourage use of the system. You do not necessarily have to do this all yourself. There are a number of accredited resellers and integrators with extensive experience of implementing EDM applications. They also provide a useful contact point for your organisation to access resources and references from customers and others in the content management community.