

Newsflash

FROM LINDA SWERLING

February 14, 2005 - Now may be the time to review your document management system.

5,000 SHEETS OF PAPER

An inactive 27" file drawer contains 5,000 sheets of paper. Multiply that by the storage required by regulatory compliance and the vast amount of information any organization produces and the cost of document storage has become a large line item.

Problem:

Over the years, a large engineering firm had created an overwhelming amount of both paper and electronic records they needed to keep for regulatory, historical, and customer service reasons. The firm was paying an off-site storage facility a substantial amount for storage of the documents.

They wanted to create an electronic document management system that would allow them to:

- ◆ eliminate on-site and off-site hard copies
- ◆ keep only one copy instead of multiple copies of the same document
- ◆ search for and retrieve documents easily
- ◆ delete documents at the appropriate time

Solution:

Level II Solutions worked with the firm's chief administrative officer to tackle this problem. The key was finding a system that had sufficient capability and was a good value for the firm's current and future needs.

- ◆ **Scanning** – While electronic documents can be saved directly, hard copy documents are scanned into the system.
- ◆ **Electronic Storage** – With options to store on its own server or use a vendor's ASP system, the firm decided to keep the documents in-house on their own server.

- ◆ **Indexing** – The team determined the critical factors that someone might search on, e.g., client name, drawing type, project number. They then set the fields that anyone who created a document would have to complete.

- ◆ **Searching** – The system needed to be able to be searched, including e-mails and faxes, easily. Anyone from the staff needed to be able to search to find all documents.

- ◆ **Retrieval** – The firm needed to be able to open, edit the documents, and save under a new name. The team chose a more robust system rather than those that allow only images (e.g. .tifs) of the document to be displayed.

The firm wanted to be able to back up the system as part of their normal backup. In addition, they chose a system that created the data in an easily exportable format to allow for change and growth.

The firm also made a decision not to go back in history but to use the system going forward because of the extraordinary resources it would take to capture history.

Results:

The firm has found that the new electronic document management system:

- ◆ Prevents lost files
- ◆ Saves internal and external storage space and costs
- ◆ Eliminates need for complex folder structure on network
- ◆ Finds documents quickly
- ◆ Reduces need for file cabinets and eliminates reams of files

If you want help in converting to an electronic document management system, please contact us at 617-277-0222 or linda@level2solutions.com.

**LEVEL II
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