OMNItrieve
document management

PLANTRO
SYSTEMS

What is
Document
Management ?

What is Document Management?

Document Management is the process of electronically capturing and storing documents.

Benefits of Document Management

❖ Office floor space savings
❖ Reduced copying charges
❖ Off-Site storage savings
❖ Improved response time
❖ Reduced future filing costs
❖ Improved customer service
❖ Reduced labor costs
❖ Improved productivity
❖ Protection against catastrophic loss

Office Floor Space Savings

❖ Fewer file cabinets take less space

❖ Historical documents can be scanned

❖ Current documents can be scanned and originals discarded or filed in storage

Reduced Copying Charges

❖ No need to photo copy or make multiple copies

❖ Making copies for multiple files is a thing of the past

Off-Site Storage Savings

❖ The need for off site storage is reduced

❖ Most documents can be discarded after being filed

❖ Computer generated reports can be maintained on-line.

Improved Response Time

❖ Get access to your documents when and where you need them

❖ Multiple people have access to your documents simultaneously

Improved Customer Service

❖ Provide your customers with answers immediately

❖ Provide instant copies of documents

Reduced Labor Costs

❖ Less labor intensive than manual filing

❖ Process can be centralized

❖ No more hunting down file folders

Protection Against Catastrophic Loss

❖ Paper documents can not be backed up

❖ Backups of documents can be stored off site

❖ Redundant sites can be maintained allowing for near zero down time

❖ More secure than paper documents

5 Elements of a
Document Management System

❖ **Scanning**

❖ **Storage**

❖ **Indexing**

❖ **Retrieval**

❖ **Access**

What is the Process?

Scan	Store	Retrieval	Access
Scan paper documents	Stored documents on the hard drive	Retrieve with tools in the system	Access is determined by the system

Considerations

❖ How many documents must the system store?

❖ How many users will be using the system concurrently?

❖ What departments will be using the system and will the public have access?

❖ What serious problems must absolutely be solved, and what issues should be addressed to make life easier or reduce costs or improve productivity?

❖ Do you want a turnkey solution or a customized one?

❖ What type of network is currently used?

Legal Issues

❖ Controls to ensure integrity, accuracy and reliability.

❖ Audit trail to prevent and detect unauthorized creation of, addition to, alteration of or deletion of records.

❖ A complete and accurate transfer of records can be made.

❖ Controls to prevent and detect deterioration of records.

❖ An indexing system that assists with finding records.

❖ Ability to print copies of records.

❖ Must be able to cross-reference with other record-keeping systems and software.

❖ Documentation on how the software works and how it has been set up.

Conclusion

- ❖ **Reduce costs**
- ❖ **Save time**
- ❖ **Increase productivity**
- ❖ **Increase customer satisfaction**
- ❖ **Improve security**