Dr Vijay Magon, Managing Director of OITUK Ltd., explains how businesses, working closer with IT suppliers, can realise tangible benefits by careful use of existing technologies to deliver successful information management strategies and systems.

Dr Vijay Magon, Managing Director
Most businesses will be dependent on both paper-based documents and electronic content as well as electronic content. The latter is surely a sign of more recent times, particularly with low-cost, high-speed desktop computing. Many businesses have fallen into a culture where information is stored in a veritable hotchpotch of formats, leading to an incoherent and ill-defined approach to information management.

At a time when the amount of information and records being dealt with by businesses grows year by year, in the form of documents, emails, electronic data streams, faxes, etc., the need for businesses to embrace a strategic technical policy towards records and information management grows ever more pressing.

In order to turn this around, Electronic Document and Records Management Systems (EDRMS) offer the chance for businesses to evolve their practices and embrace a culture of effective and compliant information management practice. EDRM should be seen as an integral component of the wider Enterprise Content Management (ECM) framework which is embracing electronic forms, business process management, collaboration, and compliance processes.

ECM is essentially a conceptual framework for centralised information access, creation, management, and standardisation of business processes. There is no magic bullet solution – just a common sense approach which focuses on the available technologies and specific business processes to ensure that the solution delivers what is expected of it. The process is a migratory one which promotes a corporate-wide information repository with newly created current documents being born onto the repository whilst legacy information remains scanned and digitised in a staged manner. While there is some ‘lag’ time in this process, a strategically planned implementation should lead to harmonisation with minimal disruption to the business.

Document management or ‘electronic filing’ started with turning paper into electronic files, which saves space, can be moved around and shared. Lessons learnt from early adoption of such systems are now being realised through more sophisticated Electronic Document Management Systems (EDMS) which supports other electronic documents and include electronic content. Add a dose of systems integration, workflow, collaboration, and compliance, and suddenly organisations are beginning to realise tangible benefits from these compliant information management practices. However, many organisations keep moving – the worldwide migration towards the Internet and the World Wide Web is pushing digitisation further into business processes and practices. This requires an integrated solution to help streamline data flow between disparate systems and a consistent approach to data storage – a Centralised Information Repository.

OITUK believes that EDRMS is likely to become as ubiquitous and as pervasive a part of a company’s enterprise application infrastructure as the telephone, with little or no dependency on paper. It is vital to understand that simply digitising paper is not enough. This solution must offer facilities to stop producing new paper processes, management, and Integration of ongoing (electronic) records, in order to minimise or eliminate the paper chase.

A strategic approach...

The returns from investments in EDRMS (e.g. process and staff efficiencies, standardisation, automation via workflow, etc.) are being realised through careful application of this technology to address strategic business requirements rather than short-term measures to solve paper problems. By managing the document while it retains a high business value, deployment and use of EDRMS will benefit from the executive attention and backing, as organisations begin to realise that these systems are not simply a luxury, but essential tools that are needed to succeed and maintain the competitive edge in the new ‘information enterprise.’

The core technology has been around for over 25 years, and is in use across many industry sectors. While this is not rocket science, its use within any particular sector cannot be generic, i.e. it is not ‘out-of-the-box.’ Consequently, its selection and implementation are complex and open to costly miscalculations.

Selection

Following many implementations there has been a loss of business across a number of sectors, OITUK believes that any solution must support the following three key components:

- **Document Capture**: isn’t just about capture of paper records to cut through backfile issues. The increasing proportion of information received and generated electronically mandates import of electronic content from other systems to eliminate document folders scattered across storage servers, and on-going generation of new electronic content, including use of online electronic forms for reporting and signature with little or no dependency on paper. It is vital to understand that simply digitising paper is not enough. This solution must offer facilities to stop producing new paper processes, management, and Integration of ongoing (electronic) records, in order to minimise or eliminate the paper chase.

- **Management and Systems Integration**: the document life cycle must be achievable for content which must be searchable and integrated with the core business systems. OITUK believes that its management has to encompass the document life-cycle which includes day-to-day business record management (including security), as well as retention and destruction in compliance with legal guidelines.

- **Implementation**: the combination of external threats (hacking, viruses, fire, theft, flooding, etc.) and legal obligations (Data Protection Act, Freedom of Information Act, Civil Procedures rules on Electronic Discovery) surrounding the issue of security of information is crucial. Information applies to all businesses across all sectors. Data merely sitting on computer hard drives or paper-based filing systems are particularly vulnerable to loss or destruction. Failure to manage electronic documents as formal corporate records will mean that organisations will not be compliant with government legislation. Compliance demands at the very least a high-level inventory of a company’s information assets and investment and careful application of available technology.

Business information also resides on many disparate systems within organisations – information relevant to any process should be presented along with the digital record, which is required. The electronic business record cannot sit in a document management system that remains un-connected with other business systems and processes.

Delivery: to be optimally effective the electronic record has to be delivered to key users when and where they need it. The problem is that there isn’t a single user type within any organisation. An organisation will have many different user roles, each with their own specific requirements, and consequently, their specific need for information. A solution which offers a standard interface for all users will provide limited functionality to most users, especially those who work under time constraints and under pressure – these users care less about the back-end processes! IT solutions must recognize this and ensure that the information displayed on a screen is meaningful to the user for the role they play. A model can be readily extended to include relevant third-party processes engaged in delivering and supporting any business process to share and collaborate.

OITUK works with companies and organisations across the public and private sectors including NHS Trusts, local authorities, Law Enforcement Agencies and the private sector. The common theme running through all these customers is their need for a robust, legislation relevant to any process should be presented along with the digital record, which is required. The electronic business record cannot sit in a document management system that remains un-connected with other business systems and processes.

Dr Magon concludes: the best way to handle this is to design an integrated solution around the needs and requirements of the people who will use it and hold accountable!
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