

Document Manager

Managing and retrieving information is the core of Customer Service Industry

– Lou Gerstner, IBM Corporation

Introduction

Enterprises including Insurance companies, Hospitals, Distribution and Retail Chain networks and Government organizations manage huge amount of data and documents on a day-to-day basis. Most of these enterprises use the trusted old method of filing the documents as reams of papers in the warehouses and storerooms. This business case provides the facts that will help you to decide on migrating from the present manual document system to the advanced, secure, business centric and easy to use "Document Manager" application. The objective is to provide you a cost benefit analysis of using Document Manager.

This business case uses publicly available data from sources like magazines and Internet.

Overview

It's a well-established fact that proper document management and information retrieval can reduce the costs of running an organization and will help retain customers and partners by providing quick information. In many cases these cost savings can be huge. Document Manager makes the organization more efficient - allowing one to do more with fewer people, lesser space and providing immediate retrieval and data security. The information is handled in a fast, friendly, and professional manner at a fraction of the cost. Additional features being added like Fax and Email brings even more benefits of using Document Manager.

Your company is counting on you to provide world-class service and also to maintain track of all the transactions within and outside the organization. You are the senior manager of the finance department of your company and you have to keep track of all your documents, invoices, purchase orders and even the changes that have happened ever since a purchase order was first created. You do not need to be reminded that these are challenging times for organizations and competition is stiff. The top management, customers and the partners continue to demand greater access and ease of doing business. Your middle managers believe that the solution to rising demand is to throw more live bodies in the organization to handle the information and store and retrieve the documents. With every passing month, the security of scattered data is also becoming critical as there is a limit to dumping the papers in a storeroom and then retrieving them by going through reams of paper. So before you sign-off on those job requisitions, consider the compelling benefits of "Document Manager" solution.

This business case has been prepared to help you understand and evaluate the costs and benefits of implementing a Document Manager solution in your organization. You will see that the benefits speak for themselves. In the end, human resources are expensive and there has to be electronic means to save and retrieve the data to cut costs, provide faster service and insure the safety of each document in your organization.

Document Management Problem

End-users throughout your company require timely and accurate information, delivered in a format they can use, in order to perform their jobs and make quality decisions. IS needs to assimilate, manage, store, and distribute reports to end-users in a cost-efficient manner, and respond to requests and changes quickly.

The current process is manual, slow, error-prone, high in printing and delivery costs, and has limited flexibility. Automating the tedious, repetitive tasks of bursting, printing, bundling, delivering, and archiving reports presents a tremendous opportunity to reduce cost and improve the flow of critical information at a high speed to the end users who need it.

Are you facing these problems?

- Lost invoices, purchase orders and official documents
- Lost the track of changes happening in the contract documents and POs
- Lost track of old transactions with customers/partners
- Problems in keeping track of project documents and the workflow
- Lost bills and vouchers
- Maintaining the file storage warehouses and storerooms
- Not able to search for a fax received from a customer

If yes, then you should immediately consider switching to “Document Manager” solution. Document Manager automates every aspect of document management and distribution to provide flexibility and complete control of the entire process with minimum effort. Configured once, Document Manager will become a dependable part of your daily operations, running automatically to deliver the information your end-users need, when they need it, where they need it, in the format they need, and delivered by the most convenient means.

“Document Manager” Solution

Document Manager is a highly scalable network-centric software system that directly addresses and solves the frequent problems of system-wide document management, report distribution, viewing and archiving and document scanning.

Document Manager provides comprehensive, flexible, and cost-effective electronic capture, separation, indexing, filing, delivery, and online viewing of computer-generated documents and reports. It includes document scanning and thus converting piles of paper in your storeroom to the electronic format. Extensions provide document mailing and faxing support.

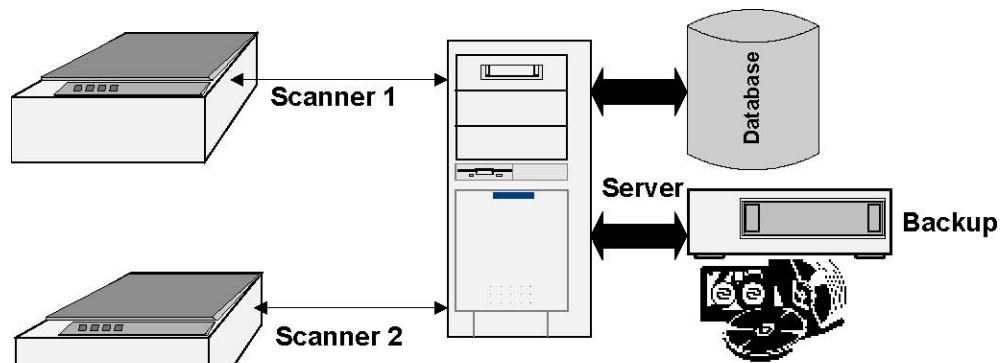


Figure 1: System Diagram

Document Manager captures, segments, distributes, and archives enterprise-wide corporate information.

So if you are trying to search for a contract paper signed two years ago, you can just go to your PC and start the Document Manager application. Enter your search date. Here comes your document !! You click one button on the "Document Manager" and enter the fax number of your customer and the report is faxed to your customer. Isn't it very cool to use?

Document Manager is not a software package. It is a customized application to suit your need. It models your business rules and the requirements of multiple departments in your organization. Authorization level of individual users can be set to view or edit the reports, create reports, access archive and many more custom made rules for your organization. At the core of "Document Manager" is a document management and imaging engine over which the customized applications are written to suit your business needs.

Document Manager is not only about software. It is a blend of high-end software solution running on cost efficient yet robust RAID Servers for data security, Dell systems attached to HP scanners. The hardware is an integral part of complete solution and can be procured directly by you or you can outsource this to TechUnified.

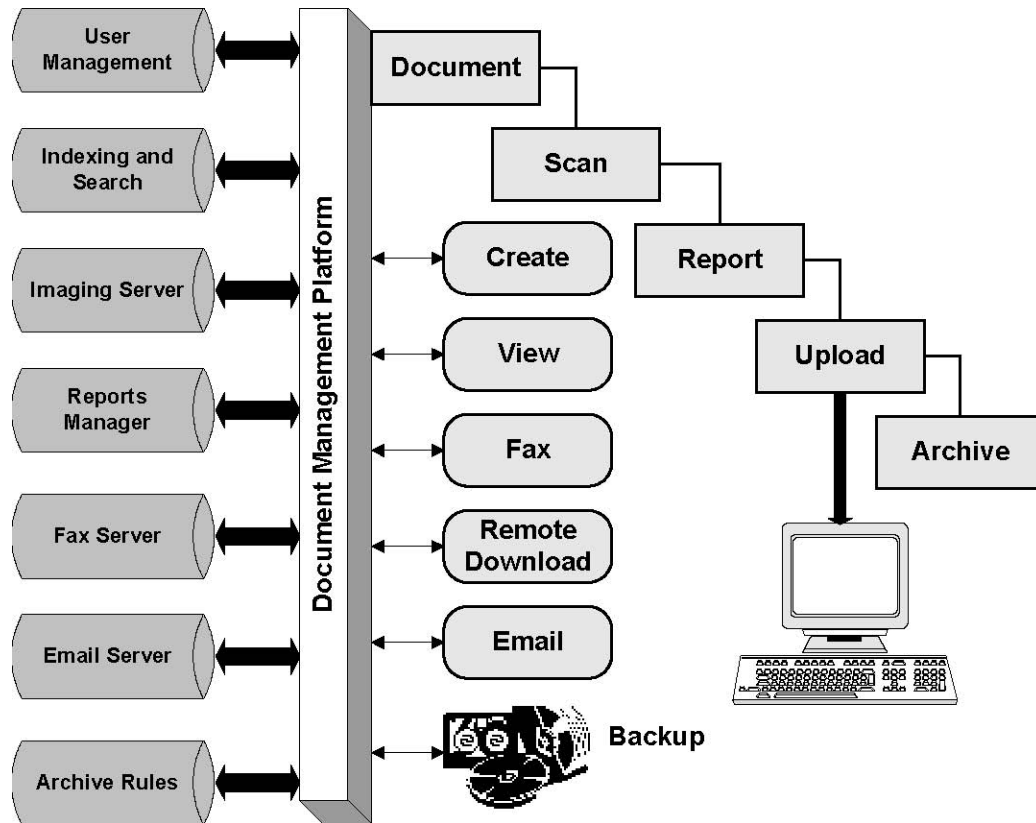


Figure 2: Design Diagram

Document Manager – Benefits and Payback Period

Document Manager will impact every aspect of your organization, providing immediate, significant, and measurable ROI including:

- Competitive advantage through faster, more concise dissemination of information throughout the organization
- Increased efficiency by department managers and end-users via simplified administration of reports
- Improved customer service
- Increased security over access to critical corporate information

- Increased control over the appearance, destination, and timing of critical corporate information
- Increased consistency of information throughout the organization
- Faster online document retrieval and management from client workstations
- Reduced filing labor and storage space required for paper output
- Reduced postage and phone costs via electronic faxing and e-mail distribution
- Improved system performance via efficient and dynamic use of system resources by Document Manager
- Reduced IT direct labor overhead associated with document handling
- Reduced support-desk calls

Payback

“Document Manager” is a combination of existing product modules and customized application development. The basic features are mentioned below. Many more features are provided over and above the ones mentioned below for no additional cost. They come as a part of the whole application.

System Components	Details
Management platform <ul style="list-style-type: none"> • User Management Module • Access control list (ACL) and System usage rights • SQL 2000 and Oracle support • Plug-in sockets for new services 	Document management platform is the layer over which all the additional services of the Document Manager reside. It's the core framework with plug and facility for new features like emailing and faxing reports

System Components	Details
Imaging Server • Image management module • Multi scanner support • Display multiple file formats without native application • Color, black and white and grey scale images • Rotation and zoom	Imaging Server is the core engine that takes care of the conversion of real paper documents in the electronic format. While converting the document to images, various manipulations can be done to reduce the size and to keep only the relevant portion of the document into the system.
Reports Manager • Indexing and Search features with Normal, Fuzzy, Thesaurus and expanded search	Reports Manager is the module where the business logic for reporting resides. Dates, index numbers, policy numbers and any more additional business rules can search reports. Reports manager provides a simple interface.
• Reports management component • Report Navigation • Annotations including Freehand lines, Straight lines, Blocking regions, Drawing rectangles, Placing rubber stamps, Sticky notes	To change the rules. New business rules at the code level will be integrated with the reports manager to suit individual business requirements.
Integration with mail clients like Outlook and Outlook Express	Document Manager will be integrated with the email clients and users of the Document Manager system can directly email the reports to desired email ids.
Integration with fax	Document Manager will be integrated with the fax machine and the reports generated can directly be faxed to desired individuals.
Application Customization	To understand the business process and requirements capturing, a couple of technical and business process analysts will be stationed at customer site- for initial system study and software customization and transition.
Conversion of existing documents in the electronic report format	Already existing data will be converted to electronic report format by individual resources sitting at customer site.
Maintenance and support	Local support available within 4 hours of service call.
Annual maintenance contract	Free upgrades will be provided for new release during the AMC period.

The business edge achieved by “Document Manager” system is tremendous. It directly improves your organizations bottom-line. Certain benefits are purely intangible yet you cannot discount them. For example, staff members might take a million dollar paper for photocopying and leave it there by mistake!! And after all, how long can you keep piling papers in a storeroom as retrieving and data security becomes tedious with each growing day. If you attach costs to all the benefits provided by the “Document Manager”, you will find that the system pays for itself in months and not years!