Document Management As A Disaster-Recovery Tool

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Questions to think about

- Are your business-critical documents portable?
- If you had to leave your office tomorrow, how would you get your records out?
- How many man hours would be involved transporting all of your paper and electronic information to a new location?
- Are your files stored in multiple locations?
- Is your data centralized?
- How would you access your data in the event of a disaster?
- Is all of your data backed up?
- How long would it take to restore your data in the event of a disaster?
- How many different formats is your data being stored?

Despite visions of a paperless office, 80-90% of all information in the average office is still maintained on paper.

That puts 80-90% of your roadmap to recovery at risk in the event a disaster strikes your business.

Transitioning your paper (and electronic) documents **now** to a document management system is one way to improve the odds that your business will survive a disaster.

What is document management?

- A **document management system** (DMS) is a computer system used to track and store electronic documents and/or images of paper documents

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The start of document management

- Beginning in the 1980s, a number of software vendors began developing systems to manage paper-based documents (DMS)

- These systems managed paper documents, which included not only printed and published documents, but also photos, prints, etc.

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- In the late 1990's, early 2000's, a second style of document management system was developed, to manage electronic documents as well (EDMS)

- The earliest electronic document management systems were either developed to manage proprietary file types, or a limited number of file formats

- Document management systems of today have evolved so they can manage any type of file format that could be stored electronically

- The systems have grown to encompass collaboration tools, advanced security and auditing capabilities

Components of DMS

- Capture

- Indexing/Metadata

- Storage

- Retrieval

- Distribution

- Security

- Integration

More than just 'going paperless'

- Scanning documents and storing them on your hard drive isn't the same thing as a document management system

You'd still be missing…

- A way to organize the files

- A way to search them

- A real-time back-up system

- A consistent file format for stored documents

- A way to share files with other people

How can DMS make your day easier?

- Answer a customer's question while they are on the phone

- Avoid having to get up from your desk to find files – when you can find them!

- Work in the office or at home

- Allow clients to add or access information on their own

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How can it save you after a disaster?

- Any document added to your DMS (paper or electronic) is permanently stored

- Access files remotely in the event of business interruption

- Ensure your documents are available in case of a lawsuit or audit post-disaster


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Other DMS benefits

- Save time

- Save money

- Increase productivity

- Increase security

- Increase accessibility

- Get organized

- Go green

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Save Time

- No more time spent filing or retrieving paper files

- Access stored files from any computer with Internet access

- Find documents you need based on indexes or keyword searches

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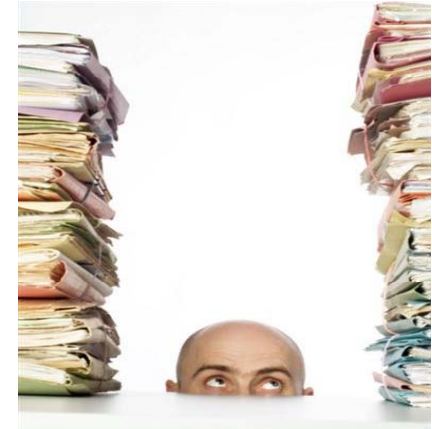
Save Money

- Eliminate the need for file cabinets and off-site storage

- Reduce your need for paper and ink

- Reduce postage, mailing and courier expenses

Increase Productivity

- Eliminate the need for filing, copying, faxing and re-filing

- No more lost files or folders

- No more water-cooler conversations while walking to and from the file storage area

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Increase Security

- Scans are accepted as original documents

- Original files cannot be altered or overwritten

- All files are encrypted

- Each electronic document has an audit trail

- Provide controlled access to your documents (you determine which employees see what files)

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Increase Accessibility

- Access files 24x7x365

- Documents can be viewed simultaneously by different employees

- Remote or travelling employees can access electronic files

- Client or non-employee access is possible with multiple security levels

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Get Organized

- Create a central repository for all of your records

- Manage paper as well as electronic documents (including e-mails and faxes)

- Store documents in a consistent file format

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Go Green

- Reduce your dependence on paper, ink and other office supplies

- Allow employees to work remotely

Industries using DMS

- Education

- Government

- Legal

- Medical

- Financial

- Every industry is a candidate

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Departments using DMS

- HR
- Accounting
- Quality Control
- Facilities
- Administration
- Compliance
- Sales

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Types of DMS

- In-house
- "Cloud" or web-based

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Document management PLUS: a walk in the cloud

- "Cloud" is used as a metaphor for the Internet, based on the cloud drawing used in the past to represent the telephone network

- Typical cloud computing providers deliver business applications online (like document management) that are accessed from another Web service or software like a Web browser, while the software and data are stored on servers

- Think Google, facebook, online banking

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Document management becomes even more powerful as a disaster-recovery tool when it is 'cloud' or Web-based.

Cloud DMS benefits

- Documents can be accessed from anywhere using a computer with an Internet connection

- Guarantee documents have been backed up by the DMS IT staff – off-site

- Access can be given to employees, clients and/or vendors in seconds

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Getting started with DMS

- Getting started doesn't have to be overwhelming
- Find a reputable provider
- Check industry record retention requirements
- Prepare your staff
- Add documents at your own pace

  - Back-File Scanning
  - Day-Forward Scanning
  - Combination/On-Demand Scanning

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- Want to see a document management system in action?

- Online demo

eBridge Solutions specific

- 98 percent OCR rate
- Bar-code indexing
- eBridge Print Driver lets you print any document directly into your filing cabinet (Word, Excel, Outlook)
- Import files into eBridge without losing original format
- eBridge Link lets you access electronic images from outside applications, like billing software
- Multiple file cabinets for various departments (HR, sales, purchasing, etc.)
- Monthly back-up CD

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About eBridge Solutions

- Founded in 2001
- Headquartered in Tampa
- eBridge Solutions document management and eAgent agency management system
- More than 1,500 clients worldwide with 180 million images and 40,000 daily users
- Clientele include collections agencies, insurance agents, medical billing companies, doctors, financial consultants, attorneys, governments and many other small to medium-sized companies
- 2009 and 2010 Inc. 5000 and TBBJ Fast 50

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Questions?