

Outdated document management systems are risky business

Companies must create a more efficient, structured and refreshed environment in light of big data and document management systems, says Greg Lock, ECM solutions architect at Itec.

Issued by: ***Itec***

[Johannesburg, 30 March 2015] -

As companies continue to face a barrage of documentation and data, there is a clear need to create a more efficient and structured environment to deal with this information intelligently. This, along with the need for mobile access to company information and an increase in **bring your own device** (BYOD) and **bring your own app** (BYOA), is driving a move towards implementing improved **document management** solutions. This is the view of **Greg Lock**, ECM solutions architect at Itec.

"Organisations want to streamline the way in which they deal with information and workflows, and this has led to a need for remote access to prevent any undue delays," he says. **Mobility** also allows for much faster interaction with the company's system, as data and workflows can be accessed via mobile devices, eliminating the need for setting up computers or laptops.

Lock says there has been an increase in the adoption of cloud-based electronic content management (ECM), which in itself has tremendous benefits. "With cloud ECM, the client does not have to invest upfront in costly hardware or infrastructure and they don't have to carry the responsibility of maintaining their servers and licences," he says. All of that is taken care of by the cloud service provider, resulting in cost and time savings.

Data loss prevention is another major concern for companies. "While **backups** are part of the solution, **data replication** is increasingly being used by clients. This is done on-site and sent to one or more different locations off-site, and serves as a clone of the customer's data that is available online," says Lock. This is a critical part of ensuring clients will not lose their data.

Data leakage is also a critical issue facing organisations. "Often, organisations share information on Intranets, or shared drives, and even though permissions are defined up-front, it is still easy for information to be leaked to unauthorised users. This, along with the destruction or deletion of data, is something companies must address. There are solutions that prevent users from permanently deleting data, which then allows the administrator to recover any files deleted maliciously or by accident, which means that the organisation's data is protected more effectively."

Intrusion prevention is another aspect that has a huge impact on document management, and Lock believes this is often an area that is not maintained. "As companies grow and more users come onto the network, permission structures must be maintained to ensure that there is no unauthorised access to data. It is much easier to manage this by using user groups, as permissions are automatically allocated based on the group the user is added to," he says. By having the right workflow in place, it also makes it a lot easier to integrate new employees into the company as it will drive their responsibilities.

Lock warns that ECM solutions form a critical part of reporting within organisations. "As companies grow and use different systems within different departments, reporting becomes a very time-consuming process. A solid ECM solution will connect to external databases and applications and tie all of those systems together, allowing for customised reporting in a professional manner," he says.

With the number of social media platforms on the increase and companies adopting some of these platforms for sharing information both to the public and internally, the management of what is shared and how is becoming much more complex. "When all your data is hosted within one ECM system, it simplifies the sharing of content dramatically, allows you to manage what is shared and notifies users that new content has been uploaded. Each user then only needs one log-in account, eliminating the need to share information on multiple platforms," Lock advises. It also eliminates the need for costly Intranet functionality to be built for the organisation. "We see many clients who have invested heavily in creating Intranets for their organisations, but this still requires someone to administer the site and upload information. If this is not a priority, it could lead to outdated information being used, leading to mistakes and further inefficiencies."

He adds that companies using outdated methods of managing content and documentation will not only

continue running the costs of existing inefficiencies, but will not have an adequate audit trail in place.

Lock recommends the following when considering implementing an ECM solution:

- * Start small. By using a phased approach, you can get the highest priority functionality up and running, train the users and drive much better user adoption. It also allows users to buy into the process psychologically, and once they are ready, you can move onto the next phase.
- * Often, companies and individuals hold onto current processes, believing that they work for them. It is therefore critical that companies, managers and users have an open mind towards the new and improved processes.
- * Start your ECM journey with the processes you are going to implement going forward and not by focusing on existing processes. That way you can improve your processes, immediately start driving efficiencies. With that time saving, you can then start adding the old documentation to the ECM solution. The data you get from current and new transactions is far more important than historic data.
- * Before you look at implementing an ECM solution, ensure you have a thorough understanding of what you need and what your existing processes are, as it streamlines the assessment process and allows for the ECM solution to be customised to meet your specific needs. Often, there are discrepancies around what the actual processes are.
- * Make sure you select a suitable ECM solution provider that will go on this journey with you.

Itec

Itec is southern Africa's fastest growing office automation, production printing and telecommunications solutions provider – with annual revenue of nearly two billion rand. Through its 47 southern African branches and an international footprint that includes the United Kingdom, the company implements total office solutions based on imported, industry-leading, and award-winning products.

Itec serves medium-sized and large businesses in sectors as diverse as financial services and retail – supporting its innovative solutions with proactive service delivery. Some of its 18 000 customers include Value Logistics, Implats, Department of Housing, Business Connexion, ADT, Rand Refinery, First National Bank, Anglogold Ashanti, National Health Laboratory Services and Advtech.

Itec management rebranded the company in 2004 following a merger of the separate copier, printer, and fax business units initially established in 1987.

For more information, please see www.itecgroup.co.za.

Editorial contacts

Itec

Marketing Team

(011) 236 2000

marketing@itecgroup.com