

INFORMATION, INFORMATION, INFORMATION

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

INFORMATION IS THE LIFEblood of all businesses, regardless of size or sector. The policy of how this information is managed and accessed should be a paramount issue to managers at all levels.

Most businesses will be dependent on both paper-based 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, e-mails and faxes, the need for businesses to embrace a strategic 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.

There is no magic bullet solution – just a common sense approach that ensures the solution delivers what is expected of it.

Therefore, the process is a migratory one, with newly created 'current documents being 'born' onto the EDRMS whilst 'legacy' information is scanned and digitised in a staged manner. While there is some 'lag' time in this process, a strategically planned process should lead to harmonisation with minimal disruption to business processes.

ELECTRONIC FILING

Document management or "electronic filing" started with the former – turning paper into electronic files, which can save space, 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 include electronic content. Add a dose of systems integration, workflow, and compliance, and suddenly organisations are beginning to realise tangible benefits from this technology.

However, goal posts keep moving – the worldwide migration towards the Internet and the resultant connectivity is pushing digitisation further into business processes and practices. This translates to integration between disparate



systems to help streamline data flow between 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 in the coming few years as database management systems have been over the past two decades. Database management systems based on open standards enabled organisations to move away from proprietary, legacy systems and opened up options for inter-operability. Similarly, EDRMS will enable organisations to minimise dependencies and process inefficiencies due to "information silos,"

A HOLISTIC 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 and Workflow systems will benefit from the long awaited 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 EDM technology has been around for some 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, ie. it is not "out-of-the-box."

The solution, as always is a happy median between the two. Following close liaison with customers across a number of sectors, OITUK believes that any solution must support the following three key components:

- **Document Capture:** this must support capture of paper records to cut through backfile issues, import of electronic content from other systems to eliminate document folders scattered across storage servers, and on-going generation of new electronic content. It is vital to understand that simply digitising paper records is not enough – the solution must include generation,

management, and integration of ongoing (electronic) records, in order to minimise or eliminate the paper chase.

- **Management and Systems Integration:** the document is the vehicle for content which must be searchable and integrated with the core business systems and practices. 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 TNA guidelines. Business information also resides on many disparate systems within organisations – information that is relevant to any process should be presented along with the digital record, when and where its 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. Each 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. IT solutions must recognize this and ensure that the information displayed on a screen is meaningful to the user and the user's role. Such a model can be readily extended to include relevant third-parties engaged in delivering and supporting any business process to share and collaborate.

IMPLEMENTATION

The implementation approach behind any IT solution is just as important as the technology employed. Given the bad press about large scale IT solutions, two valuable lessons must be learnt:

- Not all organisations are ready for the top end solutions – each must accommodate the technology and its implementation gradually to suit a number of local conditions, including budgets, IT infrastructure, user training, etc
 - A core application cannot be driven top-down without involving the people who will actually use it and be held accountable
- OITUK's approach is to evolve long-term partnerships with our customers, to understand the business objectives and requirements, and liaise closely with the key stake-holders to design, build, deliver, and support successful IT solutions at a pace that suits the business.

COMPLIANCE

The combination of legal obligations and external threats surrounding the issue of storing and safeguarding crucial information applies to all businesses across all sectors. Businesses need to put the storage and management of documents to the top of their agendas. First and foremost, there is a wide range of external



threats to a company's crucial information. These include hackers, malicious damage, fire, theft and flooding. Data merely stored on computer hard drives or paper-based filing systems are particularly vulnerable to loss or destruction.

Secondly, there is the growing amount of legislation being rolled out. Failure to manage electronic documents as formal corporate records will mean that organisations will not be able to comply with government legislation.

Compliance with legislation demands at the very least a high-level inventory of a company's information assets. Complying with legislation like the Data Protection Act, and more recently the Freedom of Information Act, and Civil Procedures rules on Electronic Discovery will require investment and careful application of available technology.

Compliance is not an issue that should be shied away from, but confronted head on, thus assuring a policy of good practice in adhering to legal compliance issues is in place. A small amount of time and resources in ensuring a coherent and watertight policy could prove a worthy investment if placed next to the potential scenario of costly legal cases arising from negligence in sticking to compliance legislation.

THE UNDERLYING TECHNOLOGY

OITUK have an established track record in providing and implementing EDMS. At the core of the OITUK solutions is the award winning C-

Cube suite. The C-Cube suite of products incorporating, work flow, electronic document, records, and content management, is designed to meet the ever changing demands of the business and help fulfil the regulatory requirements, as deemed by the overseeing authorities.

OITUK works with companies and organisations across the public and private sectors. Its clients 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 compliant information management system, which acts as a hub for vital information which can be accessed and archived at the touch of a button and deliver information to those who need it, when they need it.

From hospital wards to local council planning departments, to the leading edge in the fight against organised crime and international terrorism, OITUK is helping to demonstrate how EDRMS is making real and lasting changes to the way information is stored and managed across the UK and beyond.

FOR MORE INFORMATION

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