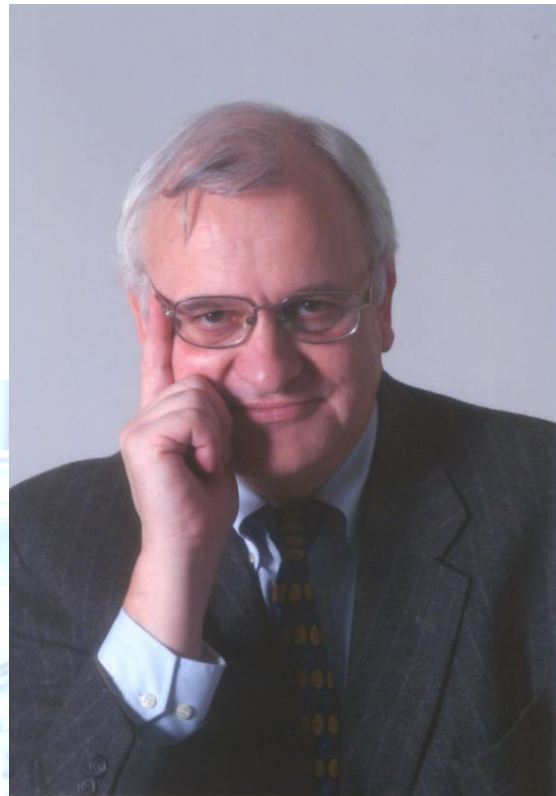


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## **ITMatters**

In this regular column Charles Zealey of ITSolve covers all aspects of business and personal computing. If you have a question about IT matters, email it to Charles on [itmatters@itsolve.co.uk](mailto:itmatters@itsolve.co.uk)



## **WORKING WITH ELECTRONIC DOCUMENTS**

We looked last month at some of the benefits of electronic document management systems. This month we will work through the way in which such a system works in practice.

The key to successful electronic document management is the control over the initial stage of document input. Consider the case of an accounts office. Typically, many documents will be received each day. These will include invoices, statements, payments, and so on. Some will be received on paper, some by fax, and others by email or other electronic forms.

## **SCANNING**

Clearly paper documents will need to be scanned - there are many different systems available to cover the range of input volumes required. Once scanned the individual documents are identified and stored. From then on all documents are handled electronically, using the same tools.

## **CLASSIFYING**

The next stage is to identify the type of document. Is it an invoice? If so, there is information that needs to be captured about that document and stored with it as a document property. So you might want to capture the supplier's name, their supplier code, the total amount and the due date as properties. Needs vary, so a significant part of the system setup is the identification of types of document and their properties.

## **SEARCHING**

Once this stage has been completed the benefits start to show through. You want to find all the invoices received from a particular supplier in the last three months? A simple search will find them all – even if some were sent on paper and some electronically. All contracts signed during a particular week? No problem.

## **PROCESSING**

Some systems provide facilities to automate the processing of documents through the system. So the invoice we have just received might be routed first to the person who will enter the details into the accounting system, then on to the person who can confirm correct delivery, then to a manager for authorisation. If the invoice is above a certain level perhaps a further approval is required before payment is made.

These simple examples show the benefits that can be obtained in better access, greater control, but above all in reduced cost of administration.

*Charles Zealey is a consultant working with business professionals helping them to improve their organisation's productivity and effectiveness with the use of Information Technology. Typically a return on investment can be achieved with 6-12 months. To access help sheets go to [www.itsolve.co.uk/HelpSheets/](http://www.itsolve.co.uk/HelpSheets/). For a free half-hour consultation on business IT issues phone 01635 869863 or email [lisa@itsolve.co.uk](mailto:lisa@itsolve.co.uk).*

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