

Tech Talk: Document Management is a natural Green IT move...

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Document management, also known as paperless office, is basically the scanning of all paper files to electronic form.

While the above explanation for document management is simple enough, the technology is not. There are tremendous capabilities in various document management systems. While scanning paper-based information to electronic form is straightforward, retrieval of that information is not necessarily so. The key is to ensure any system you implement allows you to work with and retrieve the information as you need to for your business.

Let's start by looking at the first step in a document management system: scanning your paper-based files. You will want to have a reliable high-speed scanner. There are many on the market, so I will not focus on brands, per se, but rather the functionality that will ensure your scanning is as efficient as possible. I recommend a scanner that can manage different paper sizes, like letter and legal, without having to scan them separately. A scanner that can also scan two-sided pages without having to manually flip them is important. Speeds will vary, but you want to have a scanner that will operate quickly.

While the difference in price between a slower scanner and a higher speed one may seem substantial, if you intend to scan a lot of files, you will make up the difference quickly in efficiency and scanning time. If you have a large, multi-function copier device, that may also be a viable scanning solution for you, depending on the unit's capabilities. Some units have innovative software capabilities that allow you to scan into your specific document management system, right from the LCD panel on the device. The importance of the efficiency of the scanning device cannot be understated, especially if you are going to scan historical files and get rid of file cabinets around your office. There are also companies that will come to your office and scan your historical files for a fee.

Now that we have talked about how to transfer your paper files to electronic format, the next step is where to store them. While you can scan to a specific location on your computer or network server, that makes for inconsistent filing and difficult retrieval. How would you go about finding a specific invoice from a specific vendor from two years ago? You want to be scanning into a functional database system that will index the documents based on the content on the paper or the keywords that you enter when you scan the piece of paper. This will allow the most flexible search options, being able to search by keywords you entered or any single word or combination of words in the document itself. Just as important as the database behind the system is the application that runs your document management system.

There are two systems I have been impressed with over the years: Microsoft Sharepoint and Xerox DocuShare.

All this saves money and helps the environment by reducing paper use, ink and toner for copies and prints and the need to maintain extensive file cabinets or engage with a document retention company, which can be costly. Document management is a natural green technology to embrace. If your company is not yet taking advantage of document management, hopefully this column will encourage you to do so.

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