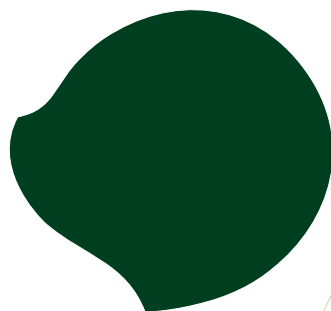


Sage ERP | White Paper

Document Management as an Enterprise-Wide Solution

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There are many reasons why the accounts payable department is the most obvious place to start implementing a document management solution. Typically there is an abundance of paper that gets moved around, so accounting personnel have likely experienced losing documents, running out of storage space, not getting invoices paid on time, and the cost of routing documents for remote approvals. Having struggled with these paper-related pains, the accounts payable department is often the first to demand a solution to make their job easier.

The accounts payable department is just one piece in the big, enterprise-wide picture though. Using a document management solution in each of the different departments will help build consistency from one area of the company to another, and it will ensure that all opportunities for cost savings and process improvements are being accomplished.

We will take a look at some of the other departments you may have, and investigate how document management can help you improve customer service, save space and money while improving legal compliancy, and gain visibility and control over all company-wide processes.

Improving Customer Service

Keeping your customers happy is an integral part of running a successful business, and being able to quickly and accurately respond to customer inquiries is a huge value to the customer. If someone were to call with a question about their order, putting them on hold while you run over to search through a stack of orders in a file cabinet reflects poorly on your company. Even worse – losing a customer’s documentation could agitate them to the point of finding another vendor that is easier to work with.

Storing purchase orders, acknowledgements, quotations and other sales documents electronically eliminates the risk of losing paper documents. Having the ability to view all related documents with the click of a button makes your response time to your customer even faster, especially if that button can be added to the order entry screens you already use.

Sometimes the sales process can get held up when a document is sitting on a manager’s desk waiting for approval. As more and more documents get added to the pile, it becomes very difficult to note the urgency of particular orders. A document management solution can be configured to send email notifications and reminders to the manager to ensure that their approval is completed on time. If that manager is out of the office or working remotely, they have the ability to approve the document from their cell phone to save time and make sure the sales order process keeps moving forward.

Processing sales-related documents electronically also frees up valuable time for the sales representatives. The time that they currently spend printing, faxing, filing and searching for orders, could be better spent making more calls to pursue new leads and check in with current customers to make sure they are happy.

To the sales department, a document management solution means instant access to customer records – eliminating the need to file or search for documents. For the company a whole, this means more time devoted to sales, happier customers and cleaner, more organized records.

Securing Information: Legal and HR

In both the Human Resources Department and the Legal Department, it is imperative that all records are secured, yet easily accessible to the appropriate staff members. This means making sure things are filed in the proper place and securely locked up, and often keeping boxes of old documents at a storage facility either onsite or offsite in the interest of space. Implementing a Document Management system in the Human Resources and Legal Departments provides all the space and security needed from the computer.

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Instant access to documents is vital no matter what department you are in.

For Human Resources, space becomes an issue because each time an employee leaves the company, the HR department is required to keep all of their documentation for a specific amount of time depending on the particular document type and what the state and federal laws require in their particular location. This results in shipping boxes of files to a storage facility, paying the storage fees for however many years are required, and then paying to have them destroyed when the time requirement has been met. If information was required of a former employee, there would be another charge to ship the particular box back, find the document, and then ship the whole box back to the storage facility. This process is not very cost efficient or timely.

Employees working in HR or Legal have to be very prudent about making sure they don't leave confidential information on their desk or in any place where it can be accessed by anyone besides them. Having printed copies of these confidential documents leaves them more vulnerable to misfiling or being left out on someone's desk.

If these documents were captured and stored in a document management system, they would be secure and easily retrieved in a moment's notice. Even for a large company with thousands of employee records and years of different legal documents to manage, the ability to retrieve documents by index property values like employee social security number, document type or date makes searching for a particular document very simple.

Eliminating paper from these departments leads to cost savings, increased efficiency and increased security. The costs associated with printing, filing and off-site storage would be eliminated. Getting a needed document would mean typing in an index value rather than going to a file cabinet, finding the correct file, then finding the particular document. Practices would always follow legal compliance because old files could be easily kept in the system, and the security would ensure that private information could only be viewed by authorized staff.

For the HR and Legal Departments, a document management solution means an easier way to access the forms they need, a better way to stay organized, and more space in the office. For the company as a whole, it means confidential documents are secured and permanently stored.

Streamlining Processes

Every department has processes. Sometimes things become second nature, so we don't even consider the steps we take and if there might be a more efficient way of getting it done. Processing payments and orders are probably the most obvious examples, but consider any department and think of tasks that pass through multiple hands and require a number of steps. How are those departments making sure those steps are all being completed and tracking its status at any given time?

In the Marketing department, before anything gets published, it is likely sent to a number of different people to read and review, and it's important to make sure it keeps moving along but doesn't miss any of the proper edits. When the Human Resources department hires a new employee, there are a number of steps to be completed – setting up a computer, password, phone, filling out forms – and it is possible that different people are involved in making sure all of it gets done. A company credit card might need to be coded and routed to all of the people that use it. The list goes on and on. Any department, any process – a document management solution can add visibility and control.

In each of the examples above, it would help to have an electronic checklist that shows which steps are completed and automatically routes to the next employee. This electronic checklist would include all of the applicable documents that have been used and notated in the previous steps, so that all of the required information is there for the employees that need it, and hidden from those who don't. If a manager wanted to see where a project stood, he/she could simply view the checklist in the document management system.

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Sometimes things become second nature, so we don't even consider the steps we take and if there might be a more efficient way of getting it done.

Creating an electronic process to emulate current processes allows you to work smarter.

- Eliminate the paper: an electronic process takes the paper that is being passed around, left on someone's desk, and physically written on, and gives the appropriate employees access to view and notate the documents from their computer.
- Gain visibility: Being able to check where a document is, or what step a process is on gives management better visibility and a quick way to make sure their employees are getting everything done in time, without having to constantly check with them.
- Get organized: With email reminders and automatic routing, it is easier for an employee to know when to get things done and who to pass it to next. Structuring a process electronically will spell out exactly who should be doing what and when, so there is no question about responsibility.

The Enterprise-Wide Solution

Before investing in a document management system, it is important to look at the big picture – all of the different ways you can integrate the solution in each of the different departments. Make sure the solution you choose has the versatility to extend throughout the entire enterprise.

The return on investment in the accounting department alone is typically very strong, but taking all of the other departments into consideration will help you see the true value of the document management solution.

If there is a department that has paper or a manual process that can be streamlined, there is a document management solution out there to eliminate those bottlenecks. Thinking of document management as an enterprise-wide solution will lead to maximized cost savings and process improvements, and making the most of your investment. Think of the improved customer service, the security and storage space, the added efficiency and time savings – maximize these benefits by extending the use of a single solution throughout the organization.

About Altec

Altec is a leading provider of Integrated Document Management (IDM) solutions to mid-market companies. For more than 25 years, Altec has provided a wide range of accounting-centric paper to paperless solutions including its flagship product, Sage ERP Document Management, which enables companies to capture, archive, workflow and route structured and unstructured documents to customers, employees and vendors. Altec's comprehensive solutions include IDM, output management, MICR check disbursement and paper documents that serve more than 13,000 customers worldwide. Altec enjoys strong, collaborative partnerships with ERP solution providers to provide the most comprehensive, integrated enterprise document management solution to the SMB market. Altec delivers its IDM solutions through a global network of authorized partners in more than 60 countries throughout the Americas, EMEA and Asia Pacific. Visit Altec at www.altec-inc.com.



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