



# Impact of Document Management in Today's Result-Oriented Business World

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How businesses can reduce paper volume and increase information accessibility

Enterprise Document Management (EDM) is an umbrella term that represents a vision and framework for integrating a broad range of document imaging, capture, search and management processes with the end result of: a centralized data repository that can be remotely accessed and queried to make finding and sharing documents simple and easy.

The purpose of EDM is to take static, unstructured information and documents and make them a dynamic part of your business. With the increasing demand for higher productivity, environmental consciousness, compliance requirements and focus on bottom-line management, organizations are looking to implement tools that help them be more productive, streamlined and efficient.

EDM makes it possible for companies to become less paper dependent and move towards a system that will reduce the time spent looking for and handling business-critical documents. Additionally, it provides a common platform for employees to collect and share customer information and to create a centralized, uniform repository that drives the business by minimizing response and fulfillment lag time.

In today's business, paper is a transitional state for information. The average knowledge worker spends 20% of his time looking for documents or information contained in documents, and businesses are spending 25-50% more than they need to process paper documents that usually end up in a filing cabinet. What's more, businesses are producing upward of 4 billion pages of paper documents each year, and despite the advances in technology and recent focus on finding environmentally-friendly alternatives, paper's usage is projected to increase.

Business dependency on paper and lack of understanding as to what the true needs of the business are

have made EDM adoption slower among small and mid-sized businesses. In addition, the user experience has been limited by proprietary systems, restrictive integration capabilities and lack of broad-based technology training. Specifically, the issues with traditional EDM software are:

1. implementation cycles are lengthy and disruptive to business
2. integration with other line-of-business software is costly & requires significant investments in programming
3. once in a system, the documents just sit and don't actively contribute to the business
4. interfaces are overcomplicated and inhibit the full usage of the software

iSynergy is a full document management and business process automation platform that helps users avoid the common pitfalls of implementing an ECM solution. With iSynergy, users can expect to:

- Be fully operational in as little as 3 weeks.
- Have information integrated throughout the organization without spending any additional funds for customization and integration programming.
- Implement technology that dynamically drives the business.
- Optimize the human resource as a critical and integral component of the business process.
- Enable reduction or elimination of manual administration and monitoring of document routing and handling.
- Deliver a solution easily understood by non-IT experts that automates and enforces business rules and processes.

The following points cover the most important features of iSynergy that will drive substantial improvements to your business processes.

- **Browser-based User Interface** — By providing a thin and intuitive browser-based user interface, iSynergy users can easily search for and manage documents from anywhere in the World.
- **Dynamic Linking** — iSynergy uses common index fields to link together related documents for easy retrieval. By eliminating data “silos,” iSynergy enables documents to be found in logical and useful ways to minimize search time. For example, a user will be able to find “Invoices” and “Checks” related to a particular order number or vendor name in the same search.
- **Ad Hoc Workflow** — Ad hoc (Latin for “for this purpose”) workflow is designed to move documents pertaining to a specific purpose, case, or situation at hand, based on the business process to which the documents belong. The Ad Hoc Workflow pertains to the different stages your document goes through in your business process and who is responsible for handling it.
- **Reporting** — iSynergy reporting allows users to check status of documents in the Ad-Hoc Workflow environments. For example, a Manager can generate a report to determine the number of documents in a process by status, thereby allowing a decision to be made on allocation of resources.

- **No Coding Integration** — By enabling any desktop or browser-based application to display documents from the iSynergy repository without the need for a programmer to get involved, iDatix has changed the way businesses share and need information. With iLink, a free module of iSynergy, any user can integrate any line of business application with other databases to further correlate data and increase usability.
- **Web-based, Distributed Capture** — Instead of scanning all documents in one central location, companies need to capture data at remote locations. With ScanDox, both scanned images and electronic documents are delivered via the Internet for centralized processing, distribution and storage in iSynergy. ScanDox is a click-once deployable, Web-based tool that facilitates distributed capture and indexing and seamlessly injects the information into iSynergy or your line-of-business application

## THE VALUE OF EDM

The value of EDM can be directly measured by comparing the changes in hard costs, like shipping and courier expenses, number of man-hours/payroll and off-site storage fees. While these hard costs are easy to compare and provide a good enough return on investment for many organizations, there are other soft costs metrics to consider. For example, by having an EDM, like iSynergy, employees will have quicker access to documents and spend less time searching for the information they need to do their jobs. In specific departments you will see direct improvements in relation to the customer experience, like customer service representatives being able to answer questions in shorter periods of time, or distribution departments fulfilling orders in hours, not days.

## TANGIBLE RESULTS

Below are some specific examples of how iSynergy was able to reduce overhead, increase revenues and customer satisfaction and overall provide a more efficient operational environment.

### ***Gunn-Allen Financial Services***

- Reduction of 20% of operation staff
- 300% increase in transaction volume without additional staff

### ***Antigua Shirts***

- Order processing reduced from 3 days to under 2 hours
- Significant reduction in fulfillment errors

### ***Network Synergy***

- 200% increase in processor productivity
- Total elimination of lost documents
- Instant access to claims status for customer support

The level of success for an organization is limited to its ability to accept technological innovation and commitment to changing their business processes. As paper transitions from essential information vessel to a transitional state for information in a process, the paradigm shift in how business has been done will take time to adopt. An organization will not escape some temporary setbacks, but most adopters of EDM technology will agree that the short-term learning curve is worth the end result, which is often more revenue, less overhead and increased productivity.

## About iDatix

iDatix is an emerging leader in the development of document management and workflow automation software all designed to simplify the workplace. Launched in 2000 by Founder and CEO, Steve Allen, the company is headquartered in Clearwater, Florida. iDatix has a proven track record of saving companies millions of dollars through the use of its technology and focus on business automation. Designed with ease of use, seamless integration and accelerated deployment in mind, the iDatix software offers companies increased productivity and a quick ROI.

For more information on iSynergy, please contact us via our Website at [www.idatix.com](http://www.idatix.com), email us at [sales@idatix.com](mailto:sales@idatix.com) or call us at (727)441-8228.