

### Installing an Electronic Document Management System

A typical company or department that is reliant upon paper document files can be using and storing:

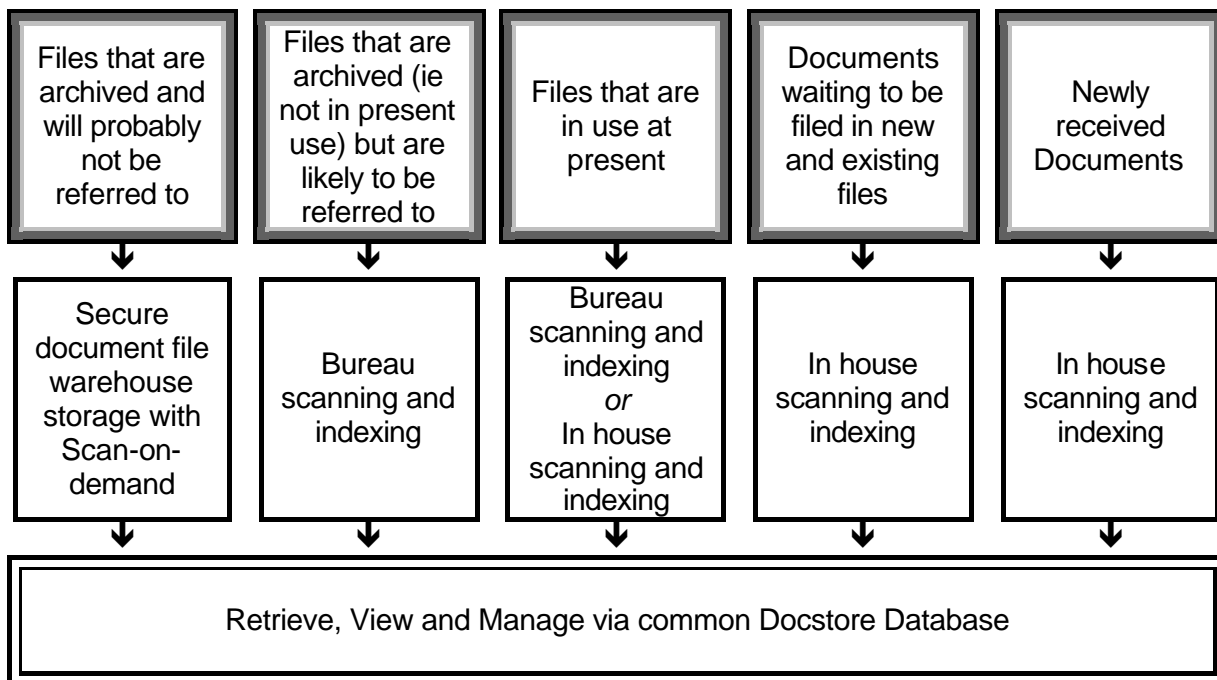
- Files that are archived and will probably not be referred to but cannot be destroyed for legal reasons or possible need to refer
- Files that are archived (ie not in present use) but are likely to be referred to
- Files that are in use at present
- Documents waiting to be filed in new and existing files
- Newly received Documents

In order to implement a successful Electronic Document Management System, it is necessary to decide how all these documents should be treated.

SMS offer a range of software and services that will enable the user to treat each file and document appropriately and cost effectively including:

- In house scanning and indexing of new documents and files
- Bureau scanning and indexing of archived files
- Secure document file warehouse storage with Scan-on-demand.
- Secure document file warehouse storage with paper file retrieval
- Common database for all scanned and stored files

As an example



Because we offer a tailored service and management of files to customer specification, we can provide a quotation for your particular requirements. You install only the equipment and software necessary for day-to-day requirements and pay only for the services you need. Plus the opportunity to upgrade to alternative options at any time.

We also offer a complete Project Management Service covering the specification and implementation of software, hardware and services plus on-going management and maintenance of your system.

## Bureau Scanning Services

SMS offer comprehensive scanning services for either backfile conversion or ongoing scanning. This can be from hard copy, Microfilm or other original media source. This service is backed by our ISO 9002 Accreditation to ensure the best possible quality.

The SMS scanning bureau is set up to process all types of documents, for example *Purchase Ledger, Sales Ledger, Personnel, Pension files, Correspondence files, Membership files, Contracts, Medical records, Health and Safety files, Maintenance manuals, Property management files, Project management records etc etc.*

Our highly trained and experienced staff will provide a service that includes:

- The collection of the documents – we always use our own transport to ensure the security of your records
- The preparation of the documents – removal from files, de-stapling, sorting if required (eg in numeric or date order) and identifying each batch for indexing
- Scanning the documents utilising state of the art equipment appropriate to the type of paperwork
- Quality control checking of each image to ensure legibility
- Identifying each batch (or document) by agreed indexing criteria (eg Name, Number, Date etc) for easy access and retrieval
- Producing CDs containing the images and Viewer software
- Installing the software on your PC or Network – updates are as easy as loading and running a CD
- Returning, storing or securely destroying the original documents
- Maintaining back-up copies of all images scanned

The service can be used for scanning existing archives prior to in-house scanning of day-to-day documents or as an on-going process with regular collections.

- All sizes of document from business card to A0 plan
- Black and white or full colour scanning
- Conversion of Microfiche and Microfilm to image

## Viewing and Retrieval Software

SMS supply Viewer software that can be stand alone or networked for single or multiple users.

The Docstore viewer software is retrieval only, bureau based scanning software product. The software can be loaded onto any PC with a CD ROM drive for loading and access of data. The system has a global database, which will point the user to insert the correct CD for the image(s) required. Alternatively the images can be stored on a local hard drive or, in the case of networked viewers on a central server. The software can be stand alone or networked

Scanned images can be easily and quickly accessed, viewed, printed, faxed, emailed or exported over a network.

**Docstore Viewer Software single user** can be installed on one or more PCs within a company or department and access and retrieve files from CD or local hard disk

**Docstore Viewer Software networked version** can be installed on any number of networked PCs and access and retrieve files from a central server as well as CD and local hard disk.

## Scanning and Importing Software

Docstore Organiser and Publisher Software are the powerful and easy to use packages for an in-house information management system.

The Publisher software has been designed to facilitate the scanning of documents into batches for processing. The documents can then be indexed to new or existing files.

And not only paper documents...

Docstore Publisher software will also store electronic documents – Word documents, Spreadsheets, CAD drawings, audio and video files – side by side with scanned document images. All the information relevant to a customer, employee, transaction, product, building etc in one place for easy access.

- Scan using any scanner with Twain or USB Drivers
- Import electronic document such as word processor documents, spreadsheets, CAD files, sound, video etc
- Search/Index by Department Filing Cabinet and up to 10 Index Criteria per Image or File. The user can search for specific files or documents using any combination of the identifying indexes. Any number of files can be open at the same time.
- View stored documents, rotate, browse, zoom,
- Annotate, add Post it Notes, Highlights
- FAX, Print, Email – Output documents to paper fax or any MAPI compliant email system.
- Export – The export function will allow the user to create composite file documents to export out to a laptop or send to another user.

The Docstore software can be purchased with the following modules to allow the user to import and index electronic documents and scan and index paper documents.

### **Docstore Organiser**

As Docstore Viewer plus facility to import and index electronic documents and files (Word, excel, image etc) to new or existing files. Plus facility to add and save annotations.

### **Docstore Organiser with Scanning Module**

As Docstore Organiser plus facility scan and index documents to new or existing files.

### **Docstore Publisher**

As Docstore Organiser plus facility to bulk scan documents into processable batches and index from queues to new or existing files.

## SMS Warehouse Document Archiving and Retrieval

The SMS Warehouse Document Archiving and Retrieval Service provide a secure and managed solution to the storage of document files. Each customer is treated individually and their documents controlled to ensure that the service provided exactly meets their requirements.

The documents are securely stored in fire and weatherproof racked containers in a modern warehouse, ensuring that the documents are safe and retrievable at all times. This latest concept in document storage is equivalent to storing all your valuable documents in fireproof cabinets.

SMS will provide the boxes for storage or, if already suitably boxed, collect the existing cartons. Each box is labelled with a unique Retrieval Access Number (RAN). The contents of the storage box is listed by the customer on form or supplied excel database file. SMS can provide the service to index individual files within the box if required.

The customer is provided with a database of the boxes (and individual files within each box if selected).

**SMS Imaging Systems Ltd Unit 8, Longshot Lane, Bracknell, Berks, RG12 1RL tel 01344 861404 fax 01344 862379**

When a box or file needs to be retrieved the user identifies the item on the database and emails or faxes the requirement to SMS. The box or file is retrieved from storage and sent to the customer's office within the agreed time scale.

The customer's database is updated with the retrieval details. If the file has not been returned within an agreed time scale an email reminder will be sent. The customer held database will be regularly updated.

- Document Storage boxes and their contents are totally secure from damage
- Each customer's boxes are stored in designated modules to ensure easy tracking of files
- Each box is identified by a unique RAN
- Each file within a box can be identified for retrieval purposes
- Easy to use database of all stored boxes/files
- Retrieval within time scale agreed with customer to suit their specific requirements
- Regular update of database and reminders of boxes not returned to archive

## **Document Archive with Scan-on-demand**

Many of our customers have their documents scanned and archive all their paper files in electronic format. This offers great advantages in storage space, security and retrieval time. Files and documents can be accessed in seconds without leaving your desk.

However, for those companies with very large document archives, it may be impractical to have them all scanned even though there are immediate advantages in accessing an electronic document rather than the original paper file.

SMS have the answer.

The customer can decide which files should be scanned immediately – perhaps the past one or two years. The residue of the archive is sent for SMS Warehouse Document Archiving as outlined above.

The scanned files and new documents received are viewed and managed using the SMS Docstore software. This allows instant retrieval of scanned files and the addition of scanned documents, Word documents etc on a daily, weekly, monthly or basis or as required by customer.

The database of Warehouse archived files is included in the SMS Docstore index. When an archived file needs to be retrieved, the software detects that this is held in the Warehouse and triggers a request for this file. On receipt of this request, SMS will retrieve the file, scan and index it and transmit the electronic file to the customer. The file is imported into the Docstore software and is, from that moment on, available as an electronic file. The original paper file can then be destroyed or put back in archive as required.

Low cost storage of older archive files while more current files immediately available on document management system

Easy to use document management software that can include the scanning of ongoing documentation and import of electronic files as well as viewing

Immediate identification of those files held in Warehouse archive

Retrieved files scanned and transmitted within agreed time scale

Scanned files always available in electronic form so no requirement to maintain paper file

Files cannot be mislaid by users when retrieved from archive and can be used by any number of different operators or offices.



**Collect your documents  
using our own transport**



**Prepare them for scanning**



**Scan them into electronic  
format**



**Index them according to  
your requirements for easy  
retrieval**



**Archive them onto a  
suitable storage medium –  
CD or server**



**Provide you with the  
software to access and view  
the document images**



**Return, store or securely  
destroy the original  
documents**



**.....the whole operation  
completed within a pre-  
arranged time scale**

Filing cabinets full of paper documents...

Shelves full of manuals...

Drawers full of plans and drawings...

Scanning documents and storing the electronic images on CD or hard disk for archiving, access and retrieval on a PC is the accepted method of solving paper filing problems.

The SMS scanning bureau is set up to process all types of documents, for example

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Quality control checking of each image to ensure legibility.

Identifying each batch (or document) by agreed indexing criteria (eg Name, Number, Date etc) for easy access and retrieval.

Producing CDs containing the images and Viewer software.

Installing the software on your PC or Network – updates are as easy as loading and running a CD.

Returning, storing or securely destroying the original documents.

Maintaining back-up copies of all images scanned.

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All sizes of document from business card to A0 plan

Black and white or full colour scanning

Up to 15,000 A4 documents on one CD

Conversion of Microfiche and Microfilm to image or hard copy

SMS have been supplying document management solutions for the last 20 years. Originally a microfilm bureau and hardware supplier, over the last ten years we have increasingly been at the forefront of the transition to electronic storage and access.

This provides us with a wealth of knowledge and experience in the design and supply of systems that meet the client user requirements, maximise performance and avoid the many pitfalls in the implementation of new technology.

Each project is treated individually to ensure that system supplied meets the needs of the client and that all images are easy to access, view and manage

**Quality** - SMS is an ISO 9002 Quality Assured company providing you with the best possible service, image quality, database accuracy, system integration and support services available.

**Established Bureau** - SMS has a large and long established bureau service to provide you with the highest quality and the most efficient turnaround from highly trained and experienced staff.

**Project Management** - SMS have considerable experience in managing large-scale conversion projects. These have included clients in Central Government, Local Authorities, Finance, Construction, Retail, Property Management, Manufacture, Law, Charities etc.



