



Choosing an Integrated Document Management System

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When you consider the array of business processes, structures and strategies at work within every company's operations, and combine those with the unique nature of various departments (such as finance, marketing, information technology and sales), it is no surprise that there are many separate vehicles or approaches used to move an organization forward in achieving its target objectives and fiscal goals.

Among the most important and common tool in that collective is the company's technological infrastructure—from its networks to its applications. To establish greater efficiencies and allow for collaborative data sharing, reporting and tracking, many businesses are taking advantage of electronic, or Integrated Document Management (IDM) systems as part of their infrastructures.

Overall, IDM systems handle a multitude of tasks and services:

- **Manage content**--Capturing and processing daily paperwork (customer records, purchase orders, shipping records, etc.) electronically, with automated integration to enterprise computing platforms (such as Enterprise Resource Planning systems). Content managed today now includes e-Mail archiving systems to speed handling and solve storage problems with large volumes of messages and attachments
- **Store content**--Storing data and image records electronically
- **Share content**--Retrieving documents commonly used by employees in multiple locations, customers and trading partners

Within each of these functional categories fall many possible products needed to create a complete system - from scanners to content and process management software to web-based document capture. How do you choose which products are right for your company's needs, and how do you combine them into an easy-to-use system?

It begins with conducting a formal Requirements Analysis: determining what you need and why you need it. Obvious, yes; but frequently, companies do not really know what they are looking for - or, what a document management system can do for them. They don't know how much they need to spend or are allowed to spend. They don't know what to ask of the vendors they plan to meet - or, which are a fit for them and which are not. They get "surprised" by the proposed costs of the system. All companies typically realize is that they need an IDM system. Then they research