

Client / Project File

Manage Client / Project File documents in a single location, regardless of format

CPF

SOLUTION DESCRIPTION

Many organizations manage their documentation on a client or project basis. "Patients", "Customers", "Investments", "Partners"...all of these files have common documents contained within each file.

The traditional means of maintaining all documentation in a paper file no longer works because of the introduction of electronic documents and email.

Through the use of Imaging and Document Management technologies, organizations can now manage all client / project documentation in a single location again. Paper (scanned), Office and email documents, photographs, sound and video can all be located within a single electronic file.

Multiple Formats

Manage paper, email, MS Office, PDF, photos and any other file format in the same repository.

Search

All documents are searchable from a variety of interfaces, including data management systems, maps and standard search engine interfaces. Find documents in seconds and know that you have the complete collection.

Flexibility

Search for individual documents within a file, or search for the whole file. Retrieve the same document type from many different files, or sort through documents relating to the whole area.

Version Control

Manage permissions around who can change documents, who can view each version and keep a clear record of all version changes.

Data Integration

Document enable your client, inventory and accounting systems. Connect individual documents or entire files to data systems in your business.

Reporting

Properly indexed documents can contribute to enterprise reporting.

Audit trail

Maintain an audit trail of documents accessed allowing for better visibility, control and accountability.



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ISSUES ADDRESSED

- Documents are managed in paper form, on personal computers, in shared drives and on the email server (the 'file' is all over the place)
- Data solutions often require supporting documentation in order to be fully utilized
- The volume of client / project documentation is increasing, faster than ever
- Filing documentation is a costly and cumbersome process
- Multiple versions of documents are being created and maintained – and the wrong version is often accessed
- Document security and retention is difficult when information is in multiple locations
- Freedom of information and privacy requirements are difficult to meet without full control over documentation
- Data systems manage documents in the database, which slows performance and threatens the system's integrity

BUSINESS VALUE

- Create a single location to manage all client / project documentation
- Properly document enable data solutions by making documentation available through the system
- Manage different versions of documents
- Maintain a secure and auditable repository of all client / project documents
- Back up all business critical documents
- Retain (for the proper duration of time) all documents
- Report on access, throughput and activity

PARTNERS

OnBase
a Hyland Software solution

FUJITSU

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Platinum Partner

Imagine uses Document Management and Imaging Solutions to simplify the way documents move throughout organizations™

Contact Imagine to discuss this solution further and book a demonstration

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