

Estates and Facilities Records and Document Management

Estates, Property Asset Management and Facilities departments should be managing their documentation records and information to strict codes of practice compliance and security. The consequences of not doing so can be financially and commercially damaging if this is not undertaken correctly and in a compliant manner.

Managing cumbersome traditionally paper based records is one of the key factors affecting business efficiency and staff effectiveness. The potential impact and legal liability around scheduled maintenance not taking place, documents going missing or drawings not being up to date in the event of an accident fire or other major event are serious concerns for most property or asset management departments.

The adoption of an effective electronic records and document management system with functionality such as collaborative Work Flow and Check In/Check Out Version control is the way to solve these challenges and deliver a fully compliant, effective and efficient 'Paper-Lite' business solution for the digital 21st century.

The Solution

The solution is very simple and thanks to technological advances, fully affordable and easy to achieve for estates and property departments of 5 to 100's of staff, managing 10's to 1,000's of buildings, assets or campuses.

Digital Process's Estates & Facilities Records Management solution delivers 100% of everything required, in an easy to use intuitive format that takes less than 60 minutes to learn and become fully familiar with. User adoption is key when introducing a 'Paper-Lite' records management system, as this ensures 100% of the value and benefit is received.



Key Deliverables Include:

- A low cost electronic Estates records and document management solution.
- A secure safe & fully compliant solution.
- A secure 'zero cost' Archive management solution.
- Powerful search capability across all content or libraries.
- Strong administration rights control (people/departments/libraries).
- Ability to scan images and save all document formats and types.
- Integration with MS Office & MS Outlook for Email archive.
- Full template and forms creation & management.
- Check In/Check Out document version control.
- Work Flow for document & project collaboration and maintenance tasks.
- Quick, easy to install, ODBC compliant.
- Hosted, Cloud based or locally installed options.

Key Business Benefits and Returns:

- Provides an intuitive, powerful, easy to use solution.
- Delivers 'Full Compliance' for records and business processes.
- Ensures all documents are managed in a single location.
- Eliminates storage, archive, and on-going operational costs.
- Delivers strong administration rights and audit trail.
- Delivers significant time efficiencies for staff.
- Enables visiting 3rd parties to save documents fast.
- Secure remote user/3rd party access save money and time.
- 'Hot Folder/Drop Box' enables admin staff strong management.
- Easily add new documents (Scans, Emails & MS documents).
- Delivers a 'Paper Free' business environment cheaply and effectively.
- Easily integrated with other systems (ODBC compliant).
- Removes the need for multiple 'software tools' to deliver similar functionality.

Operational Management Improvements

By migrating to and adopting an electronic Estates Property and Assets management system such as InfoRouter, the department can return truly significant costs savings and departmental efficiencies. Staff time is limited, but now people can find what they need fast. Remote users or maintenance staff can now write up their reports and complete forms and templates remotely, quickly and simply or just send them into the 'Hot Folder/Drop Box' within the system, where admin are notified by E mail of the documents arrival. They then file it correctly and securely.

Staff can now multi task, working on several documents/records/projects simultaneously, they can compliantly 'Check Out' documents and work on them, checking them back into the system adhering to ISO compliance. Version control is maintained, with an audit trail.

With document types having to be kept for 10 years and more, the pure 'costs' that can be saved over that time is huge. Records can be sectioned off to an Archive Library, with a specific set of administration access rights so storage costs are eliminated, and compliance challenges are solved. The Return on Investment metrics are very interesting, when comparing a paper based system over that of a Digital Process solution. We can provide a detailed 'ROI Analysis' for each situation on request, and this goes a long way to convincing management of the value delivered.



Maintenance & Services Records, Property Asset Management.

Many departments have a multitude of costly software solutions that they have traditionally used to manage maintenance records and tasks, track and manage asbestos, rent renewals, leases and many other property management tasks. These include PIM, MiCAD, IPR, PlantFM, Terrier etc and all have significant capital and on-going maintenance costs associated with them.

In 2012-2013 it is true to state that more than 65% of these systems are only partially used (10%-50%), due to their complexity and in only delivering a small part of the fully requirement. Training is costly, so this resulting in very weak user adoption, thus the old paper based or shared drive processes are still relied upon and adhered to, affecting compliance and efficiency.

Our solution delivers a single unified digital Property Estates and Asset Management System that is easy to use, powerful and effective, very low cost, and delivers:-

- A powerful logical depository for all and any type of document or set of processes.
- Separate libraries can be allocated to specific tasks eg: Services, Maintenance by discipline or element, 5 year electrical, Fire Risk Assessments etc.
- Maintenance task schedules and staff management can be managed via Workflows, with Check In/Check Out ensures compliant ISO Version control for all documents.
- Asset Management can also have multiple Libraries and associated Work flows to automate annual or monthly tasks, Rent Reviews, Renewals, Surveys, Space Planning etc.
- Digital Forms and Templates enable 'Paper-Lite' or even 'Paper Free' efficiencies.
- Building Projects and minor works can be managed via the Work Flow enabling full collaborative working across remote and local users.
- Third party and remote staff have secure browser access driving efficiencies.
- Staff are usually proficient in less than 60 minutes use, with huge online libraries of video training and support, free of charge. This means people understand, enjoy and adopt the system.
- All document formats are supported, with MS Office and Outlook addin's and WebDAV Distributed Authoring allows fully control over the functionality you desire, and the way you want it delivered.

ISO & Regulatory Compliance

A critical factor in regulatory compliance is a centralized repository of electronic business records. InfoRouter provides this effective centralised compliant solution that helps streamline the capture, classification, retention, disposition and management of important health records and documents.



Companies have to make significant changes to their IT infrastructures and business processes to comply with regulations such as:-

- The corporate governance Sarbanes-Oxley (SoX) Act.
- Health Insurance Portability and Accountability Act (HIPAA).
- BS 10008:2008 and The Civil Evidence Act 1995.

Archiving e-mail messages, protecting the confidentiality of sensitive medical records, documenting financial transactions are no longer optional. An effective Records Management Solution is essential.

InfoRouter Records Management System is an integrated solution that allows organisations to create and manage a set of uniform models for retention, security, classification, search, retrieval and automatic notification and alerts for changing content.

In the ever-changing landscape of business where non-compliance may mean costly fines, sanctions, litigation and

personal liability for corporate officers, InfoRouter provides an effective regulatory compliance solution that helps stay compliant with the growing number of regulatory compliance initiatives and industry regulations.

By using InfoRouter, you can manage your company's financial liability and litigation risk by effectively addressing the mandates imposed by the following:

- Managing of records related to medical financial and accounting information for compliance with the Sarbanes-Oxley Act (SOX) particularly with Section 404.
- Industry regulations, such as ISO certification.
- BS British Standard Institute BS 10008:2008 and The Civil Evidence Act 1995 (Evidential weight and legal admissibility of electronic information).
- Regulatory compliance with mandates from governmental agencies such as Securities and Exchange Commission (SEC).
- Regulatory compliance with mandates from HIPAA.
- Compliance with Federal record-keeping laws and regulations. DoD 5015.2 Compliant Records Management.
- British Standards Institute BS 10008:2008 and The Civil Evidence Act 1995.
- Managing of records related to civil litigation or government investigations.
- Managing of records related to Human Resources such as discrimination, wrongful termination, sexual harassment etc.
- Corporate Governance.
- Banking Compliance.
- Process of documenting and testing internal controls.
- Document retention, document retrieval and audit trails and tracking of documents.
- Management of electronic medical patient records.



User Adoption, Installation and Commissioning

Fast effective user adoption is very important for a smooth migration to an electronic records management system. Our solution requires less than 60 minutes use for the majority of people to become very proficient and comfortable in using and relying on the tool. There are online videos showing specific tasks, and a large amount of free training collateral. This means training requirements and costs are greatly reduced and the time it takes to fully adopt is short.

Installation can be on a fully Hosted solution, Cloud based or fully installed on your network. Access is secure via a simple browser, so onsite and remote users are now seamlessly connected via a secure fast and effective system.

Installation takes less than a day, and most IT departments can achieve this themselves, due to the large amount of information that is available to them online. As such installation costs are extremely low.



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