

It's time to clean up

Declutter and organize your information with a content management solution

INTERVIEWED BY JAYNE GEST

In most businesses today, file cabinets and paper documents are dwindling as employees scan documents and create digital records or forms. The problem is the information isn't organized. It might sit on a shared network drive, where security is poor, and data can be easily removed or overridden. There's no way to use analytics to search and information is moved and lost.

"In the past year, many companies we've gone into store information electronically, but realize they can no longer manage it. It becomes a hodgepodge. They need our help cleaning up the clutter and organizing it," says Nano Zegarra, chief technology officer at Blue Technologies.

Smart Business spoke with Zegarra about how to use content management.

What's the difference between document management and content management?

Document management was tied to papers or files. Technology providers are moving toward content management solutions, which manages information, such as a client record in your customer relationship management system. It's no longer applied to a document or item.

What's the easiest way to get started with content management?

Every organization is different, but you should focus on the most sensitive and important files. For a manufacturer, that might be data sheets, which are updated regularly. In a school district, it's student records. For a hospital, it's likely the patient records. In other organizations, employees are the most important asset, so their documents need to be secure. Perhaps, it's documents with a strict retention, where a file needs to be removed after seven years. Otherwise, if a legal or regulatory matter

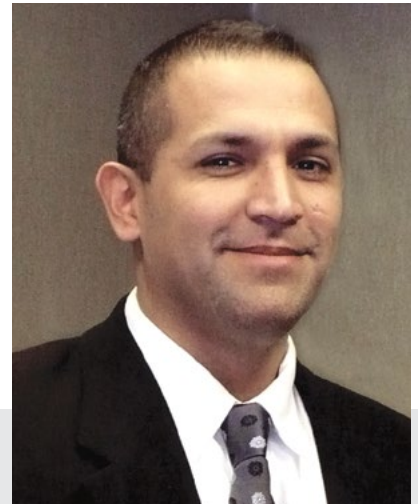
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comes up, that file may be discoverable.

Document storage and life cycle can be difficult to manage. When documents are transactional — move from person to person or must be reviewed — that's where content management, which adds structure and forces everyone to act in a certain manner, can be beneficial.

How does it typically evolve from there?

Once it starts with a vital area or process, such as finance or HR, one thing often leads to another. A company might start using content management for accounts payable. It inputs invoices, purchase orders and packing slips. Then, it makes sense to add contracts and vendor information.

Enterprise content management is the goal, where everyone follows the same rules and there's business continuity. That way, employees aren't asking for help or hunting around. It's in a singular solution with access to everything related to that account — invoices, contracts, issues, emails, etc.

Is it difficult to integrate content management into existing technology?

Usually it's not a problem to move into a solution that manages content. If you have something you're comfortable with, you may be able to add features and link it together. It's rare where the only option is to take it all out and put it into something else.

What are some features to consider?

Most content management solutions today are not pre-configured. They are user friendly, and the solution molds itself around you. You don't have to use a wrongly named tool or fill out an unnecessary field.

The idea is to avoid time wasted creating, looking for or deleting documents. At one company, each office filled out and sent Excel sheets to corporate, but with no connection to the enterprise resource planning (ERP) system, someone had to retype all those values. Content management can mimic the Excel form, and once it's submitted, it's reviewed before being pushed into the ERP. As companies grow, you don't want to throw more bodies at menial tasks. It's more efficient to spend time looking for errors that can be corrected, rather than keying something in twice.

How can a technology provider help?

The best providers work with you to eliminate pain points. If you had a magic wand, what would you like this to do and look like? For instance, it would be great to type in a value and have everything come up, broken down by year, rather than have all contracts over here and the invoices over there. Your technology provider can help you figure out what will work best for your organization — and give you a few options to choose from. ●