

BEFORE

1 the problem...

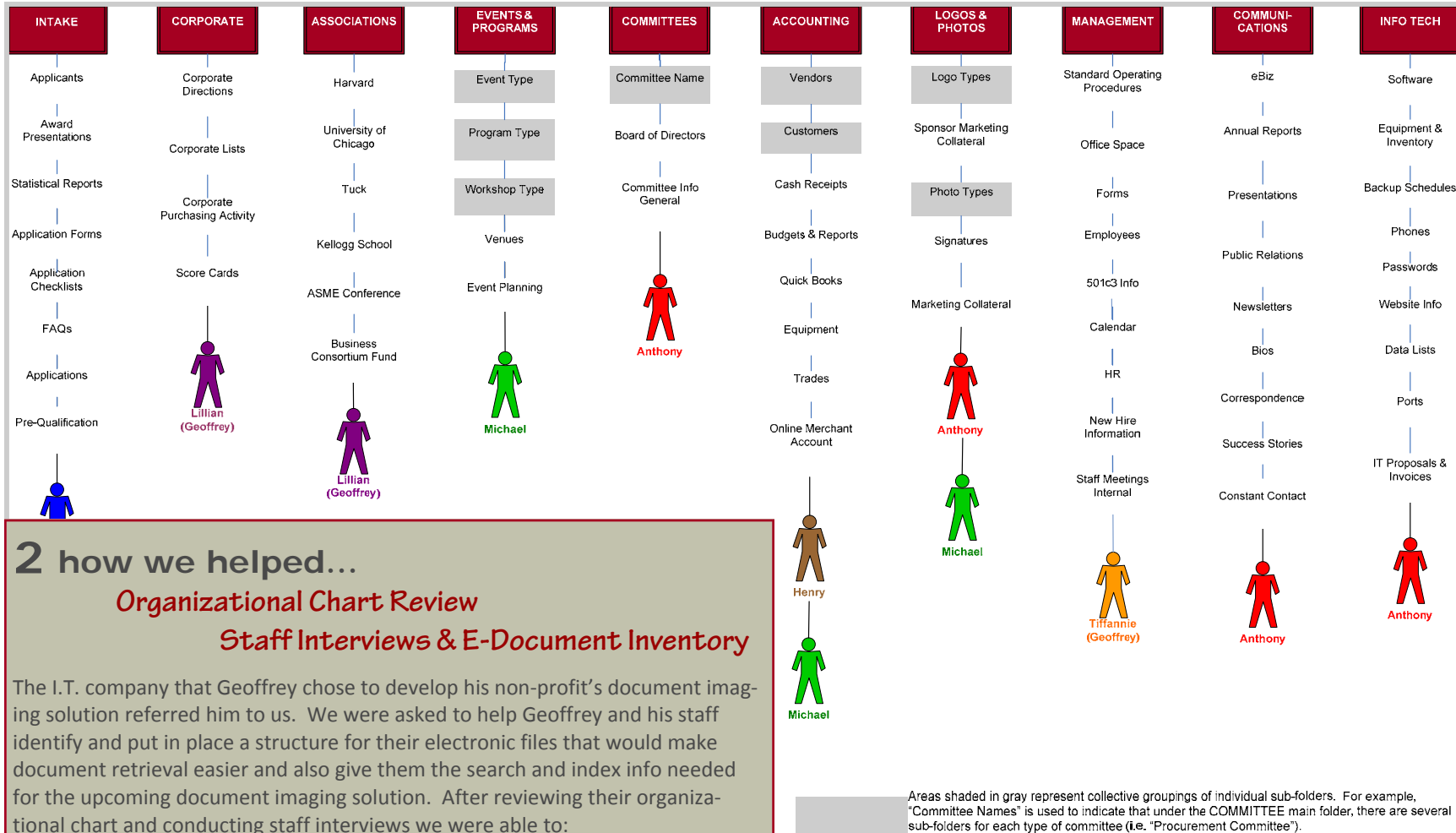
Excess E-File Duplication
No Restricted File Access
Time-Intensive Document Retrieval

As the CEO of a successful 30-year-old non-profit organization, Geoffrey considers himself to be both business and technologically-savvy. He was especially excited about the new direction he was working toward—a paperless office. Geoffrey courted several I.T. companies in hopes of finding the optimal document imaging solution.

However, what Geoffrey did not realize was that he would have to first have a better structured e-file management system before any I.T. company would be able to develop a customized solution for them. With well over 5,000 electronic documents to sort through, the document imaging solution would be a costly one and without the full support and cooperation of his staff, the project was sure to be a failure.

Copyright © 2007-2009. Equilibria, Inc.

This case study is based on actual facts and data. In our efforts to uphold client confidentiality, we disguise and sometimes eliminate revealing data. The photograph shown in this case study is the property of Equilibria, Inc. and is intended to be used for educational purposes only. Reproduction and distribution without authorization is prohibited.



2 how we helped...

Organizational Chart Review

Staff Interviews & E-Document Inventory

The I.T. company that Geoffrey chose to develop his non-profit's document imaging solution referred him to us. We were asked to help Geoffrey and his staff identify and put in place a structure for their electronic files that would make document retrieval easier and also give them the search and index info needed for the upcoming document imaging solution. After reviewing their organizational chart and conducting staff interviews we were able to:

- Take an inventory of all electronic document types
- Purge unnecessary and duplicate files
- Identify who should have access to which electronic documents
- Group electronic document types by organizational chart departments



3 value & results...

↑E—Document Imaging Readiness
 ↓E—Document Retrieval Time
 ↑E—Document Protocol

As a result of the electronic records management system we were able to implement, this non-profit:

- Reduced the number of main file folders on the network by 92%
- Saved \$10,000 in preparing for the future document imaging software by hiring us as opposed to the selected I.T. company (this was outside of their core service)
- Automated a lot of their e-documents thereby eliminating the need to scan several boxes of paper files—this also saved them from having to hire a potential part-time scanning assistant with an hourly pay of \$15.00/hr
- Assigned file administrators to each grouping of files and documented future file maintenance and protocol to ensure that all staff was on the same page
- Decreased amount of time to retrieve files; reduced file duplication by 65%!

LOGOS & PHOTOS

File Folder Administrators

Melanie [REDACTED]
 Jonathan [REDACTED]

File Folder Description

The “Logos & Photos” folder houses all digital logos, photos, and images used for [REDACTED] marketing collateral.

File Folder Housekeeping

1. All photos must be named by the name and date of the person, place, or event.
Example: IMG_0987 is now: Geoffrey [REDACTED] Board of Directors 02-18-07
2. Delete all files that are no longer useful to the [REDACTED].
3. Archive the previous year’s data.
Example: At the end of 2007, transfer all photos taken in 2005 to the Archive files.

File Folder Archiving

1. Digital photos consume a large amount of server space. Retain two years of historical photos.

2. Only move and archive logos once the client has provided a replacement logo.
3. All other data should be transferred to the archive folder located on the F:\drive at F:\[REDACTED]\Z ARCHIVE FILES.
4. At the end of each calendar year, remove the photos necessary to ensure that the last two years worth of historical data remain.
4. All brochures, images for marketing collateral, stationary, and letterhead is located under the “[REDACTED] Marketing Collateral” sub-folder.
5. Anyone desiring to add, delete, or otherwise modify a photo or logo document in the “Logos & Photos” folder must first gain clearance from the file administrators.

File Folder Specific Protocol

1. Sub-Folders are organized by: Photo Type, Logo Type, Digital Signatures, and [REDACTED] marketing collateral.
2. Each sub-folder representing a specific type of photo can be further sub-categorized (sub-folder (2)) by like clusters of photos.
Example: The sub-folder “Photos Events” may have a sub-folder (2) entitled “[REDACTED] 2007” because there are several photos associated with this one EVENT.
3. All other photos that do not involve clusters should be appropriately named and categorized by the Photo Type.



AFTER

