Don't Let
Document Management
Drag You Down

Most of the unproductive time spent responding to customer requests for documents can be eliminated through the use of today's technology.

Although nearly all metals service centers are using some form of computer software in their operations, most fail to take full advantage of information technology in the document management area.

Defined broadly, document management is the method by which documents are handled, processed, stored and retrieved in order to support an organization's decision-making processes and its customer requirements. Most everyone organizes their emails, documents, scans, and the like, in some fashion, with more sophisticated users developing naming conventions to make identifying and retrieving their documents easier. But more often than not, the organization as a whole does not have a document management system. Many rely far too much on paper documentation instead of taking full advantage of the technology available to them today.

Although most companies routinely scan mill test reports so they can provide them to customers when requested, most other documents are not stored as an electronic image for quick review or retrieval. The lack of some sort of organization-wide electronic document management system leads to wasted time locating documents and delays in sending them to customers and prospects. The lack of timely access to the documents and the information contained in them leads to increased costs of labor and poor customer service. Postage,

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faxing and copying expenses can be greatly reduced for outgoing documents if they can be sent directly from the ERP system.

Most of the unproductive time spent in researching, reporting and forwarding copies to customers can be eliminated with the implementation of a proper document management solution. Many stand-alone systems are available, which can be used to improve productivity and response time while reducing the space and expense required.

Some ERP systems offer integrated document management. These simplify the creation of the records and provide for their retrieval in the most convenient locations within the business software application itself. An integrated system can be linked to scanned documents
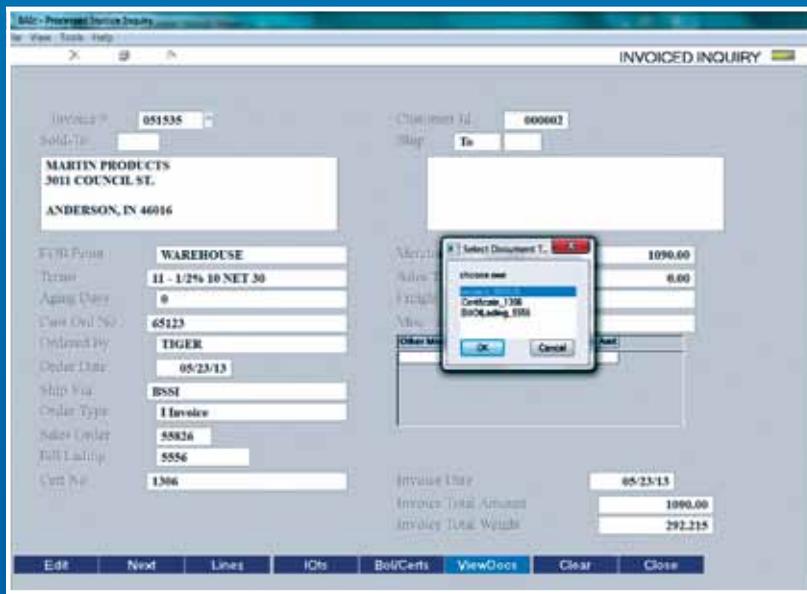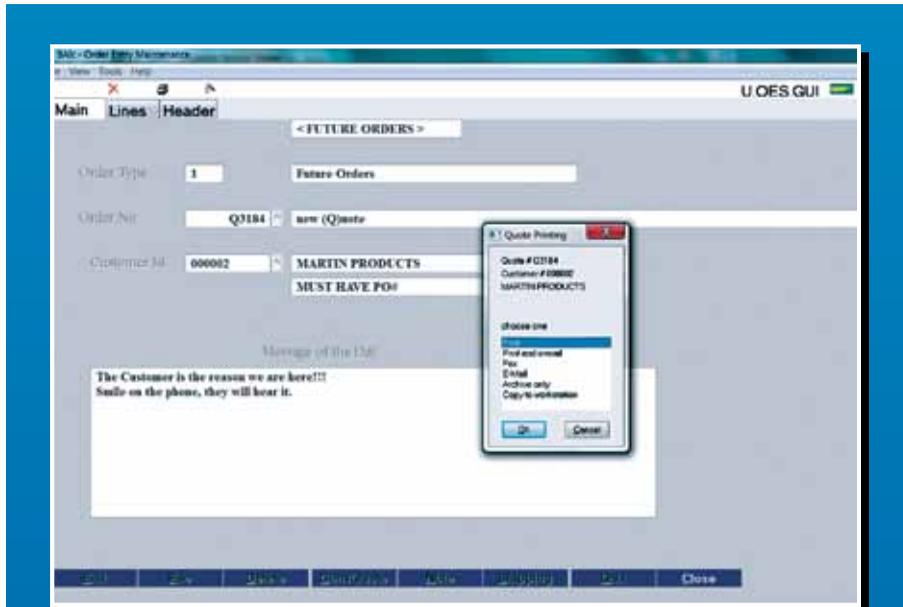
Business Automation Inc., Orange, Calif., offers the Metal-Pro fully integrated enterprise computing system for service centers, fabricators, processors, producers, smelters and recyclers. For more information, visit www.baipro.com.

that were received from outside sources such as mill test reports and invoices, and also can create and link internal documents without the need to print and scan them first. Imagine having the ability to directly email a quote to a prospect right from the quote entry program without having to first print and scan it, or even search through a list of contacts for the prospect's email address.

A full-featured document management system could even send a copy of the quote to the outside sales rep at the same time. While viewing an invoice record in a customer sales history, the system could bring up an image of it and fax or email it to the customer. While viewing the invoice, the inside sales rep could also request to view all related documents, such as the sales order, picking ticket, packing list, bill of lading and mill test reports, and fax or email them, as well. A good system can provide all of these features, create all system reports (both standard and report writer queries) and more, and allow the organization to provide extremely quick response to customer requests, while lowering the cost and effort. With the right document manage-

Document management features integrated in an ERP system can allow the user to call up images of various types of documents and print, email or fax them simply and quickly.

ment software, electronic documents can be reviewed by anyone who has been given access to them, from anywhere, and at any time, via the Internet. Management, salespeople, shop and accounting personnel and, yes, even customers, can view and download copies of whatever documents are desired.

Software innovations have revolutionized how busi-

nesses create and manipulate information, but they also have created a new set of challenges: finding the right information, visualizing and understanding it, and then taking action. All the time employees spend managing and organizing documents could be much better spent on analysis, collaboration, insight and other work that adds value to the organization. ∎