

# Document management

## Where we were

Electronic document management has slowly been introduced in to the social housing sector over the past 15 years. Previously organisations witnessed paper filing records held on desks, filing cabinets overflowing, defragmented records management, tenancy files missing and documents stored in garages and warehouses. There was also a culture that “*Nothing is real*” unless it is on paper.

## Where we are now

Document management has evolved from the simple storage of images to fully automated workflow systems, mobile access to documentation 24/7 and electronic processing of invoices thanks to purchase to pay. As a result, Electronic Document and Records Management Solutions (EDRMS) are considered to be amongst the core systems required by registered providers along with their housing, finance, asset management and HR/Payroll systems.

The EDRMS is a key enabler of agile organisations and links directly to the delivery of corporate objectives including:

- Being able to resolve customer queries at the first point of contact
- Process automation
- Cost savings both in staffing and office space (through reduced requirement for storage space)

## Drivers

### Compliance

EDRMS deliver a number of core benefits. However one of the major drivers is the need for compliance with the Data Protection Act. At present housing associations are not required to comply with the Freedom of Information Act, however there are often indications that it may well be extended to include housing associations and even if not, it does represent good practice in information management.

### Other benefits

- Improved data security
- Improved access to full customer data
- Easy access to documents from any location
- Enhanced business intelligence
- Improved disaster recovery and business continuity
- Cost savings (from improved efficiency and reduction in storage costs)

## Considerations

When introducing EDRMS there are a number of factors to consider, including:

- Cultural change
- Creation of the filing structure
- Categorisation of documents and records
- Retention and disposal policies and procedures