



20

YEARS OF INNOVATION

SAMPLER

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Visit our website
www.document-logistix.com



Document Logistix is a friendly technology company with a collaborative culture. We enjoy what we do and enjoy making the lives of our customers better by delivering continuous innovation and excellent support.

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Press Pack Notes

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THE HISTORY OF DOCUMENT MANAGEMENT



1. The Filing Cabinet

Edwin Siebels invented the filing cabinet in the 1880s to solve problems in a world with ADMD (Acute Document Management Disorder).

2. The Server

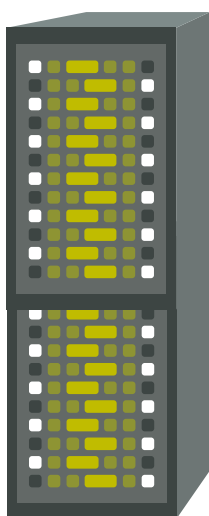
With the advent of computing, electronic document management (EDM) started to address the curse of office spaces full of filing cabinets.

BENEFITS & BUSINESS DRIVERS

- Reclaim unproductive space
- Reduce storage costs
- Improve incidence of loss

ISSUES

- Computing costs
- Unstructured documents



3. The PC

When PCs started to get distributed and connected on a LAN (local area network), companies



were able to create and store documents on their computers. However, new capability also meant unstructured documents proliferating and being scattered everywhere.

There was also an eight-dot-three character naming convention and lack of control of documents that hampered the early days of EDM caused issues. Plus we saw early signs of some issues that persist today in many organisations: no version control, no audit trail and lack of security.

BENEFITS & BUSINESS DRIVERS

- In-house capabilities
- Electronic ease

ISSUES

- Difficult to manage, track and control
- Security

4. Electronic Document Management Systems

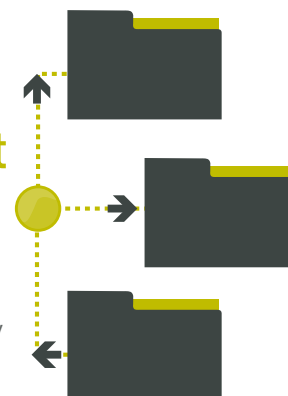
Electronic document management (EDM) evolved in the 80s. Initially EDM was a complicated tool managed by expert operators. By the early 90s user-friendly systems saw the emergence of knowledge workers using DMS in their roles, which then extended to non-specialist staff. We also started to see more collaboration with clients using EDM and automated processes such as the retention and timely destruction of records.

BENEFITS AND BUSINESS DRIVERS

- Role-based effectiveness
- Collaboration with customers
- Data capture in multiple formats
- Automated document destruction

ISSUES

- Aligning EDM to business processes
- Searching for documents



5. The Search Engine

With thousands of documents scattered digitally, the issue of locating

documents became increasingly important, which sparked game-changing innovation. DMS providers began to integrate full text searching. Companies can now find any document in their DMS in seconds.

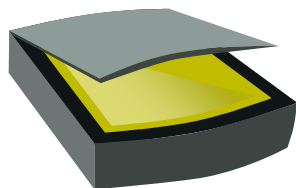
BENEFITS AND BUSINESS DRIVERS

- System efficiency
- Staff productivity
- Operations' speed

ISSUES

- Optimising data capture, storage and retrieval

6.The Scanner



Scanners have been part of the EDM landscape since the mid-1980s and have become progressively faster, simpler to use, and more integrated. Scanner technology today means anyone can take a 50 page document, attach a barcode to it, and automatically scan directly into their DMS ready to edit, share, and collaborate.

BENEFITS & BUSINESS DRIVERS

- Reduced reliance on paper
- Fast, cost effective technology
- Office and staff empowerment

7.The Cloud

The Internet means companies have a choice about how they manage documents depending on their specific circumstances, budgets and preferences.



Companies are not totally reliant on local servers to host their data or IT staff to maintain it. They can choose to outsource their servers, IT staff and software

to the cloud. Software-as-a-service (SaaS) means the DMS infrastructure is pre-built in the cloud and software is available on-demand via a web browser.

BENEFITS & BUSINESS DRIVERS

- Infrastructure and cost options
- More forms of remote working
- Entry level EDM options

ISSUES

- Making the right EDM deployment choice

8.Smart Devices

Smart phones make 'information at your fingertips' a reality. Users can access their entire document database, as well search documents and share them externally directly from their phone or tablet.

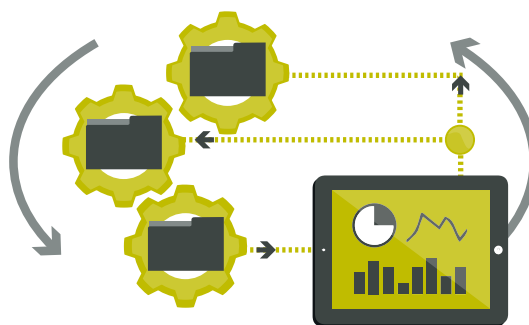


BENEFITS & BUSINESS DRIVERS

- Portability
- Convenience
- Speed

Electronic Document Management today

On the one hand, in many companies knowledge workers still waste 25% of their time searching for the right version of a document. On the other, progressive companies are exploiting EDM to the full by integrating EDM with their business processes and functions such as dynamic workflow design, automated workflow and business intelligence dashboards. EDM is also at the forefront of compliance management and easy-to-manage retention policy implementation.



Hot EDM topics

- Business process review
- Dynamic workflow design
- Automated workflow
- Checkpoint alerts
- Inter-departmental efficiency
- Multi-site EDM integration
- Remote working effectiveness
- Compliance management
- Robust security
- 100% audit trails
- Document retention policy management
- Business intelligence dashboards
- Customisable user interface
- Deployment and access options
- Partner, customer and supplier processes and collaboration
- Speed, efficiency and productivity

OUR PEOPLE

Dan Wajzner is Managing Director of Document Logistix with responsibility for ensuring that products and services deliver real, demonstrable value to our clients.



After various degrees in biochemistry, genetics, computer science and research in computer vision, Dan worked for technology-centric management consultancies, leading projects across a broad range of industry sectors. Here Dan gained valuable experience of how organisations create value through optimisation of processes, technology and supporting organisations.

From here, Dan moved to the position of Group CTO for a multinational software company with a portfolio of industry leading products. Then alongside his colleague, Tim Cowell, Dan founded Document Logistix. As well as focussing on document management and workflow, their main business goal was to ensure they could continue to invest in their products, people and customers. This meant the company would be continually innovating and able to bring new products and services to the market that make a tangible difference to the companies, departments and individual members of staff who use them.

Tim founded the business in 1996 and created the document management software.



Having gained his degree in Computer Science in the days of punch cards, Tim first worked for an IT consultancy firm before joining the R&D team at Epson. 10 years at Epson gave Tim valuable experience in R&D, Customer Services, Management and Consultancy, before he decided he could do it better and started a Document Management business.

Tim likes the challenge of an industry in which products are always evolving. He says that when he first started, the early adopters wanted relatively simple image archiving systems, whereas now Document Logistix delivers complex, automated business systems into a mature market with workflow and portable devices.

Kim, USA, worked with Document Logistix as a VAR then bought into the growing business in 2007.



Kim loves Document Logistix software and how it permanently changes customers' businesses and enables them to operate more effectively.

Kim has been in the document management space since 2000 and started selling Document Manager as a reseller in 2002. She thrives on helping customers to attain their goals, which in turn helps Document Logistix to achieve the next level of success.

Kim has helped customers with radically innovative systems in recent times, including a manufacturer with their HR on-boarding, and District Attorneys with e-Discovery.

WHAT TO ASK IN A DOCUMENT MANAGEMENT SOFTWARE WEBINAR OR DEMO

When you have an expert in front of you talking about the place of electronic document management today in a webinar or demo, what are the questions you should ask to find out whether the software you're viewing is the right software for your company?

In these days of customisation and personalisation, no one should have to tolerate being forced to work according to the software's rules. So, first of all, you should ask just how adaptable is the software solution to your organisation's needs?

- Can I change the navigation?
- Can I arrange my searches and alerts, and share work?

Today, business process integration is the name of the game. Managers are aiming for line-of-sight across their businesses; operators are looking for efficiency and standardisation. Ask the DM expert how their solution can help you achieve these objectives. How extensible is the software from department to department; how does it integrate with other systems; and how future proof is the software under review?

Most established electronic document management software will allow you to capture paper and digital documents, store, retrieve and share them. What else does the software do? How much automation is there and does the system help keep you compliant with industry regulations. For example, can you implement a records retention policy so that records are kept for as long as required and destroyed at a prescribed date?

Workflow, workflow, workflow. How easy is it to set up a rules-based process that protects your specific business workflow, with authority levels, access privileges, approvals, alerts and reports. With some document software, adapting workflow and the checkpoints within it can be a laborious and costly exercise. Ask if the provider offers anything different. Would you be able to create and implement workflows yourself, without specialist programming knowledge? Could it be as simple as 'drag and drop'?

A growing requirement in many businesses is the need for real-time business intelligence. With so much data across all areas of a business from client services, to manufacturing, to accounting and cash control, to specialist documentation such as legal case work or contracts, how can you possibly monitor it all? Ask about a business intelligence dashboard that makes it simple to amalgamate complex information into an at-a-glance business barometer.

Finally, you should ask questions about your investment. Here are the top four considerations of document management software buyers.

Challenge Document Logistix with your questions.

1. Cost & value

The greater percentage of companies identify this as the single most important factor. So ask how and over what period of time the system typically delivers a return on investment.

2. User friendliness

This is the second most common factor in people's DM software buying decision. Ask how you can be assured that the software will be as easy for you to use as it is for the experienced software demonstrator. Can you talk to other users as well as try for yourself?

3. Cost of ownership

Flush out any unforeseen or hidden costs associated with installation, integration or maintenance. It's important to have full knowledge of ongoing costs to operate the system.

4. Software flexibility

A major requirement for successful document management is the software's ability to integrate with legacy infrastructure, including ERP, CRM and other line-of-business applications.

DLX: A HISTORY OF R&D & INNOVATION

Criminal case discovery electronic management

The drive for greater criminal case transparency arose from Congressional Acts that prescribe the availability of evidence, as is called for by 'Brady disclosure.' Information and evidence that is material to the guilt or innocence, or to the punishment of a defendant, must be made available.



Kim Kuykendall speaks on Document Logistix innovation that helps District Attorneys meet Discovery mandates

While Congressional Acts mandate disclosure, they do not specify a disclosure process. Typically state representatives, including state attorneys, the police, crime and forensics labs, have been forced to rely on an expensive mix of sorting paper by hand, scanning and digital posting or sharing.

Attorneys are turning to electronic technology and digital document management to implement best practice recommendations for criminal case discovery.

Document Logistix has been a leader in the field of electronic document management in law enforcement and legal case proceedings for many years. The company has recently been helping District Attorney offices meet compliance obligations and received this highly favorable review of its innovative work.

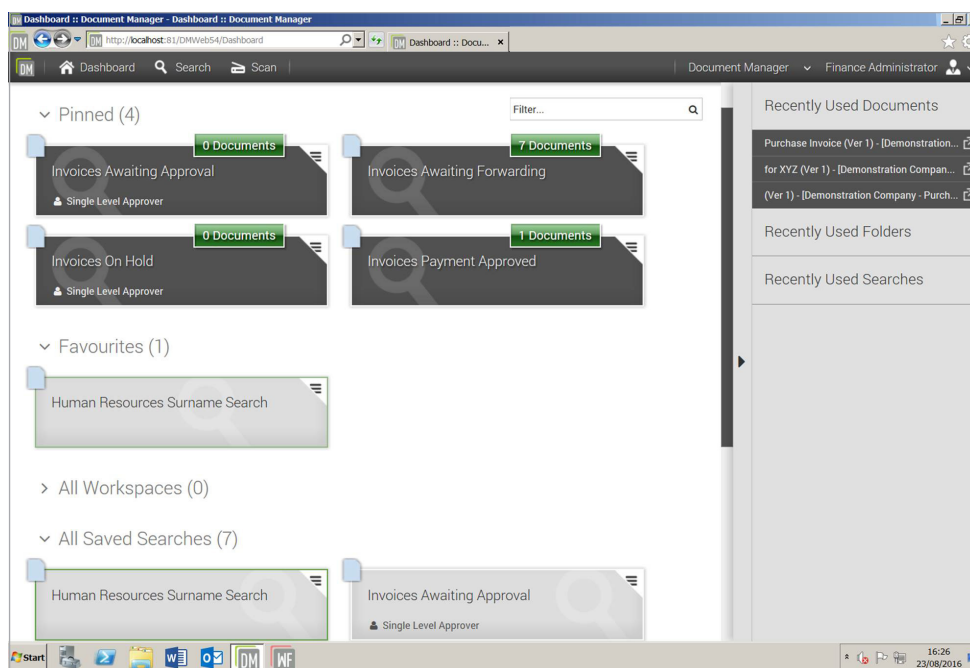
"With the help of Kim Kuykendall and her team at Document Logistix, the Waller County District Attorney's office has become the leader in Texas, and possibly the US, in criminal case discovery compliance. Collaborating with Document Logistix and nationally known prosecutor Warren Diepraam, we have produced a product that not only ensures open and honest criminal prosecutions, but also helps protect prosecutors from Brady claims and streamlines the sharing of information."

As well as honesty and transparency, cost reduction is another benefit of electronic innovation. Best practice recommendations exist that are designed to encourage parties to meet and confer to identify and resolve problems associated with stored information in the most cost-effective manner to avoid unnecessary duplication of time and expense for all parties.

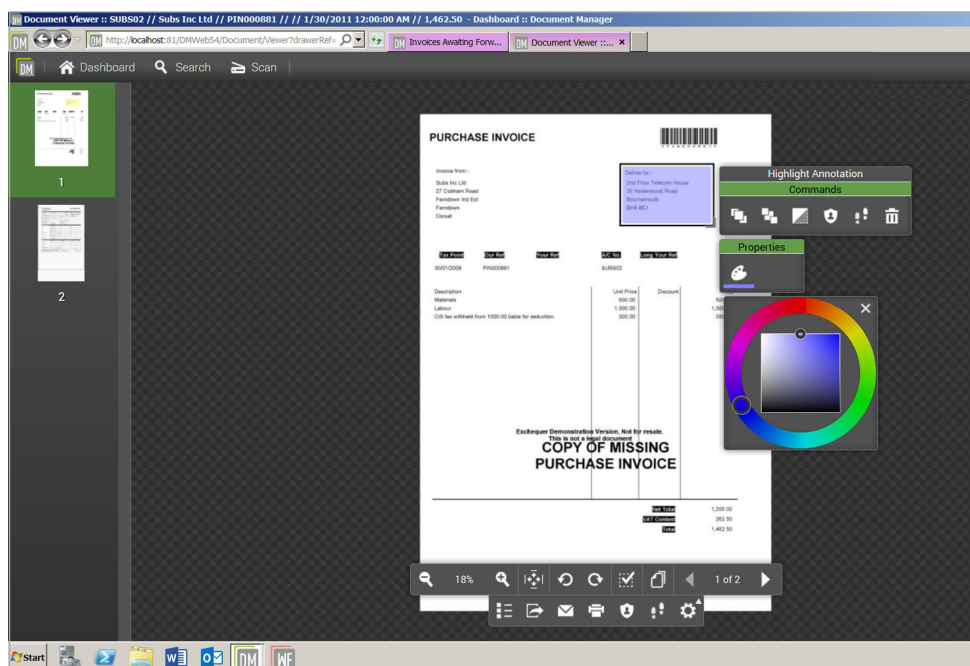
Another aspect of new discovery recommendations suggests that information should be available for examination at a location other than government offices, which can also be facilitated using electronic document management.

In the US legal system, further initiatives are being introduced to manage cases more effectively where the volume and nature of the discovery materials increase the complexity of the case.

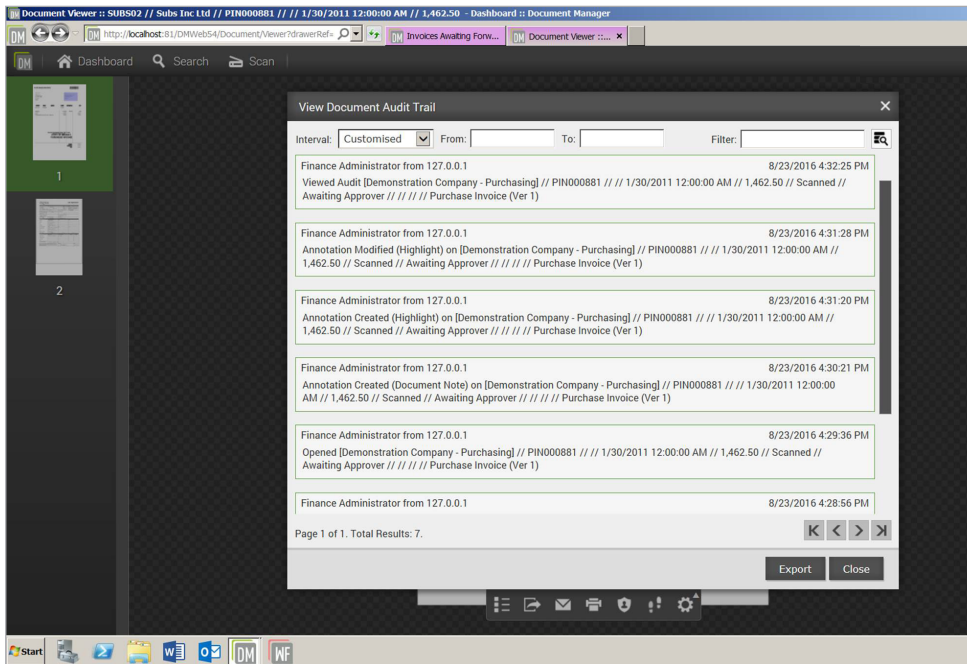
WORK THE WAY YOU CHOOSE WITH DOCUMENT MANAGER V5



- Pin and arrange all your favourites to suit the way you work.
- Searches run automatically in the background so you don't miss any actions.
- Keep all your recent searches and documents in the foreground.
- Flexible dashboard organisation.
- Search and View outstanding actions.

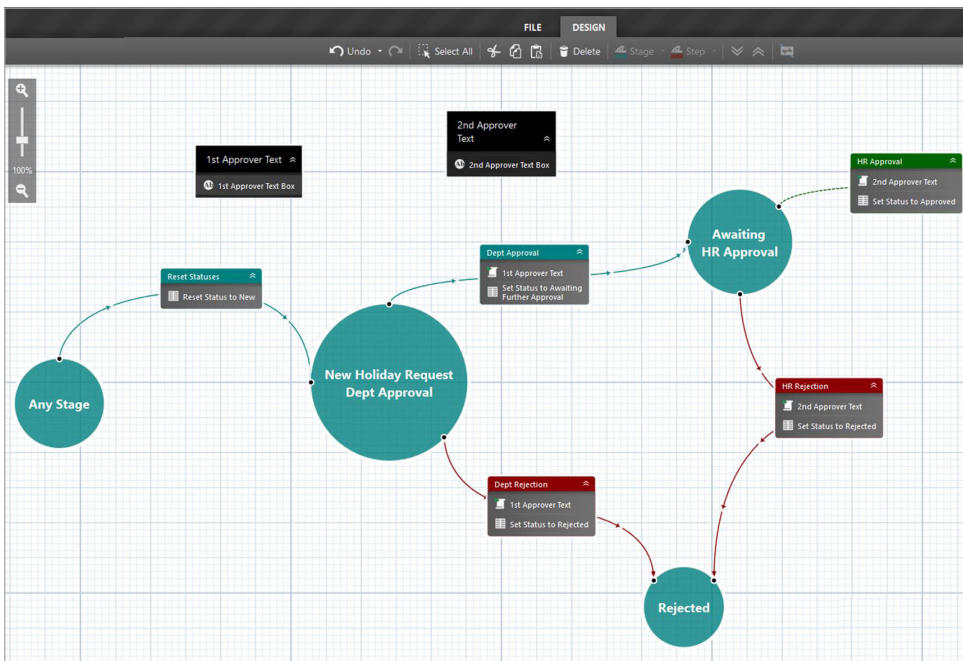


- Preview without clicking, simple for all users.
- Zoom, annotate, dialogues.



- Most important: detailed, time-stamped audit trails.
- A full audit trail of activity for management review, quality assurance and compliance.

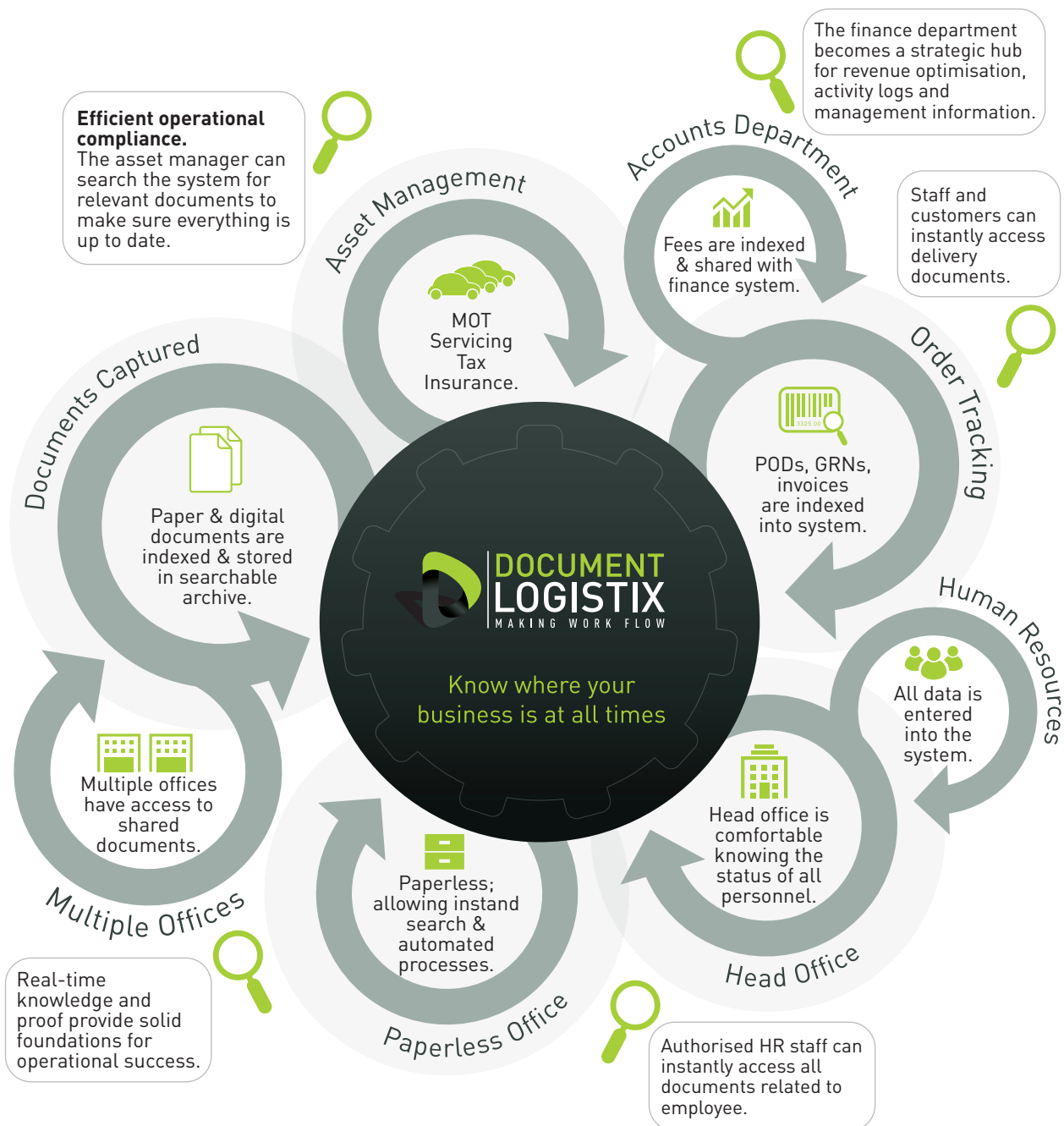
DOCUMENT MANAGEMENT V5 FEATURES WORKFLOW AUTOMATION WITH ALERTS



- Set workflow paths, budget or other thresholds, escalation. Paths and alerts (pinned searched, email or pop up), for any process checkpoint.

HOW DOCUMENT LOGISTIX HELPS YOU

Manage information across multiple processes, departments, offices, colleagues, partners & suppliers



PRODUCT: DOCUMENT MANAGER

Whether you are looking for a simple document image archive or a complex business process automation solution with workflow, **Document Manager** offers the total solution in a variety of configurations to meet your business requirements.

Select the functionality you need with a simple to use but rich and intuitive user interface that users love, which ensures quick uptake by staff and a rapid return on your investment.

Purchase or subscribe

Install **Document Manager** within your organisation or subscribe to our Software as a Service (SaaS). **Document Manager** is the right answer whatever your preferred business model. Or choose a hybrid approach for peace of mind and disaster recovery.

Easily configurable for any business process

Document Manager works for any type of business application, department or industry. Our clientele have deployed our solution for Insurance, Health Care, Finance, Legal, Law Enforcement, Human Resources, Logistics, Manufacturing, Construction, Housing, Charity, Fire Service, Pensions and countless others.

Security, admissibility & compliance

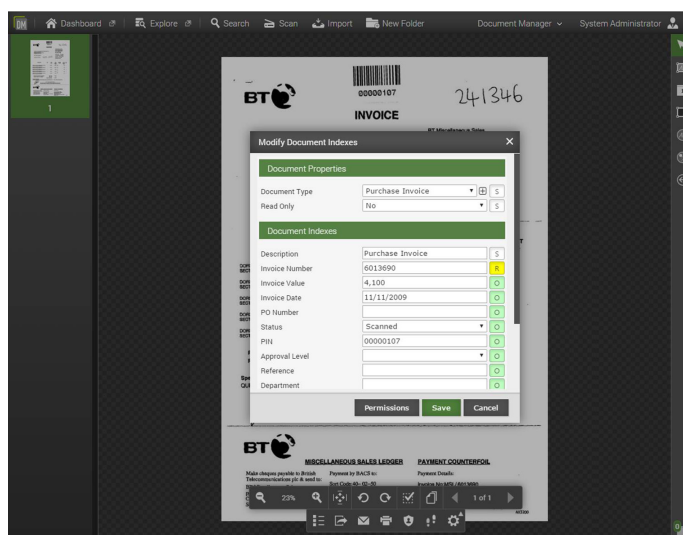
Compliance with requirements like Sarbanes Oxley, Freedom of Information and other industry specific requirements like HIPAA. A complete legally admissible Audit Trail is maintained.

Simple scan & store options with on demand search & retrieval

Smart paper scanning options work together with digital document capture via Outlook and other transmission tools. Search is fast and is easy across all stored content. Frequent searches can be saved, automated and shared. Search for metadata such as reference numbers and document content or a combination of both. Thumbnail document previews help to select the right information.

Workflow process automation

Use **Document Manager's** integrated Workflow to automate critical business processes in finance, operations and HR. Define simple rules that link process steps and provide visibility of progress, bottlenecks, and whether SLAs are being met.



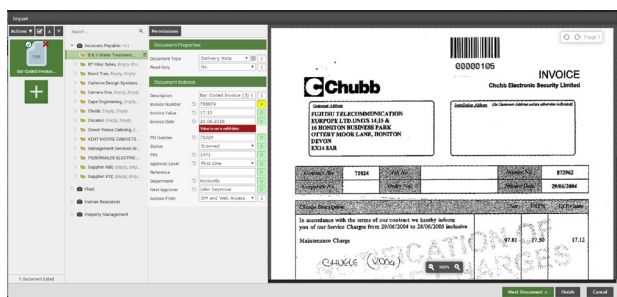
Document Logistix offers more intrinsic value than competing solutions. We include a robust set of standard features compared to competitive products that upcharge for the same functionality as additional modules.

Extensive Functionality – value for money

Document Manager has an extensive set of features normally associated with products at a significantly higher price point.

Modern architecture – technology showcase

A multi-tier application built using the latest technology to ensure a future proof solution that integrates fully with other leading business applications.

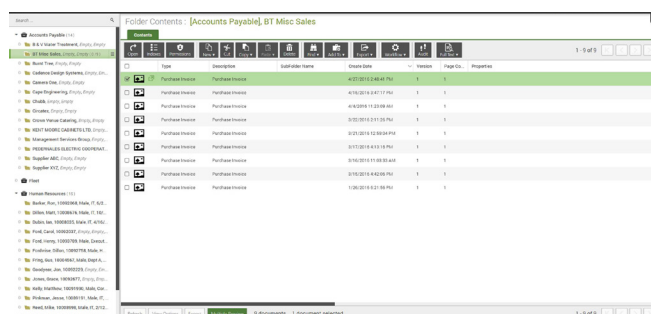


User Interface – Happy users

Document Manager is the first DM application to be deployed using HTML5 which provides a rich, intuitive user interface and optimised performance.

Rapid search – right every time

Locate all stored documents by free text content search as well as metadata. Locate documents such as orders and proposals to compare similarities. Most important, never lose another document!



Integration – works with your existing business systems

The benefits of document management are greater when integrated into your current business systems.

Document Logistix client and partner feedback is excellent on our proven track record of integration with business systems, including: Oracle, SAGE, JD Edwards, Exchequer and SAP. Whatever your application in Finance, HR or CRM, the documents you want are only a click or two away.

File types & applications – no format barriers

Whatever document types your organisation works with **Document Manager** can work with them. Any file that has a file suffix associated with an application can be managed by **Document Manager**, including documents, pictures, movies, sound recordings, CAD, etc.

Email – simple MS Office integration

Document Manager integrates with Microsoft Outlook, Word and Excel, and allows messages and/or attachments to be saved directly to **Document Manager** as .msg files.

DOCUMENT LOGISTIX: MAKING WORK FLOW

Document Logistix has been making work flow since 1996. Initially operating under 'Tokairo Ltd', the company has always focussed on delivering affordable and scalable document management software that eliminates the use of paper, improves records management and automates business processes. It is present in numerous sectors, from education to manufacturing, not-for-profit to finance and legal, retail to construction and housing.

Document Logistix's document management and archiving software enables businesses to more effectively manage their internal paperwork and workflows, to cut their dependence on printers, accelerate invoice approval processes and reduce their carbon footprint.

Twenty years later, Document Logistix has the proven experience and expertise to deliver great functionality quickly, that's simple to deploy, offers excellent value and integrates seamlessly with existing systems to centrally capture, index and store all businesses documents.

400 satisfied clients have chosen Document Logistix for:

- Compliance: delivering standards for ISO9001, Prince 2 and MCSE, and ITIL.
- Better productivity: easy access to centralised information and improved decision making.
- Improved business continuity: enabled through document archiving software.
- Great ROI: customers typically experience a return on their investment within one year.
- Increased security: tighter control of document user access.

www.document-logistix.com

Twitter: @DLXMK

DAN WAJZNER, MANAGING DIRECTOR, DOCUMENT LOGISTIX

At Document Logistix Dan is responsible for ensuring that its products and services deliver real, demonstrable value to the company's clients.

After various degrees in biochemistry, genetics, computer science and research in computer vision, he worked for technology-centric management consultancies, leading projects across a broad range of industry sectors. Here he gained valuable experience of how organisations create value through optimisation of processes, technology and supporting organisations.

From here, Dan moved to the position of Group CTO for a multinational software company with a portfolio of industry leading products. Then alongside his colleague, Tim Cowell, Dan founded Document Logistix. As well as focussing on document management and workflow, their main business goal was to ensure they could continue to invest in their products, people and customers. This meant the company would be continually innovating and able to bring new products and services to the market that make a tangible difference to the companies, departments and individual members of staff who use them.

Away from work Dan is a family man with a keen interest in sport, following Bedford Blues, Brighton & Hove Albion and Sussex County Cricket.

LinkedIn profile: <https://uk.linkedin.com/in/dan-wajzner-72bb321>

DOCUMENT MANAGEMENT SOLUTIONS FOR BACK OFFICE SYSTEMS

An industry survey of fund managers and fund administrators shows that in a bid to overcome the challenges facing their organisations, 87% of companies say improving back office technology is key to providing them with competitive differentiation.

The back office is where tasks dedicated to running the company take place. Although the operations are seldom prominent, they are a major contributor to a business and its efficiency.

Digital document management and workflow software with Document Manager helps businesses to automate a wide range of back office processes. Document Logistix offers three key solutions:

HR Document Management

The solution is designed to streamline recruitment document management and HR processes. It does this by enabling all physical and digital documents relating to an employee to be captured and stored, including archiving software for emails and their attachments.

Accounts Payable Document Management

This solution is designed to accelerate payment processes. As a flexible system it enables users to optimise workflow, from the receipt of an invoice, through to the approval, payment and archiving processes.

Managing invoices by Document Management

This solution is designed to streamline business processes. It achieves this by helping organisations to deliver a more efficient and effective system for managing transaction related documents.

By updating its back office systems, Document Logistix helped Direct Wines to receive approved invoices within half an hour.

Read the Direct Wines case study:

www.document-logistix.com/case_studies_documentmanager_wines.php

SO MUCH MORE THAN JUST DOCUMENT MANAGEMENT

There are so many companies out there that claim to provide document management solutions, but most are just selling simple software. Document Logistix is different. It provides critical business benefits generated by improved digital document management.

Document Logistix is focussed on providing better, faster access to information that you need to perform your role. Now there is no delay in finding the information you need to solve an accounts issue, HR, project management, or customer service matter.

With effective document management from Document Logistix, you can be sure that you are dealing with the latest version of the truth for added confidence in your decision making, and to maintain productivity levels.

Furthermore, with today's consumers, clients and suppliers expecting fast, personalised service, it also provides speed and accuracy to enhance your brand. And everything is done while maintaining tight security, compliance and risk management by facilitating audit trails, records retention and disaster recovery.

- Direct Wines: now receives approved invoices within half an hour.
- Pensworth: storage space requirements have been virtually eliminated.
- Asthma UK: saving thousands of pounds each year through Gift Aid compliance.
- Heald Solicitors: document search times now average less than 15 seconds.
- University of Birmingham: maintaining details of 24,000 pension scheme members, 14,000 staff and 65,000 students.

Read case studies in full: www.document-logistix.com/casestudies/

GOVERNANCE, RISK AND COMPLIANCE

ECM: the changing face of document management

Today document management has morphed into enterprise content management, or ECM. ECM is both a strategy and a set of applications that help organisations to achieve business outcomes. Records management becomes part of a company's capability to meet compliance requirements.

Corporate compliance, legal and risk officers at companies of all sizes are turning to technology to manage compliance risks. Information security concerns have meant that more attention is focused on risks from legal, regulatory and privacy perspectives; as well as the potential the misuse of information by employees, customers or partners.

Compliance

Most organisations, regardless of industry, have some level of need for compliance and information governance. Time stamped audit trails can play a significant part in reducing risk.

Information lifecycle management

With new ECM systems, information managers can expand their strategies to focus on managing content, in electronic and physical documents, throughout its lifecycle, from creation to archiving and deletion.

Access all media

Records management programmes are the foundation for information governance. They encompass records of all kinds, including paper documents, digital documents, digital files, email and emerging social media content.

Document management and beyond

Records management today is more than a technology platform.

Much of the content that comes into an organisation — or is generated by employees — is directly or indirectly linked to processes.

Enterprise content management systems integrate with one or more line-of-business systems and drive or interact with the organisation's workflow system.

Digitisation: the future

On the one hand, digitisation creates new risks, while on the other, digital records provide new ways for companies to organise, monitor and record information to improve processes and manage risk.

DOCUMENT LOGISTIX SOFTWARE AND SOLUTION DEVELOPMENT DRIVEN BY CUSTOMER ENGAGEMENT

In a recent industry survey, 97% of SMEs said customer engagement is 'essential' or 'important' to their business. Valuable insight from customers fuels intelligent decision making, and enables you to develop new products or services that better meet customer needs.

Document Logistix has understood the importance of customer engagement for many years, which is why it established a user group to aid in its product development and innovation.

The company's customers work in many diverse sectors, including education, property management, housing associations, law firms, manufacturing, insurance and finance. And users of Document Manager work in every department, front of house and back, including accounts, customer services, procurement and HR.

At the most recent event, held in June 2016, guests, including customers and partners:

- Shared their experiences.
- Explained how Document Manager was able to overcome their most complex challenges.
- Detailed the longer-term roadmap for future developments to Document Manager.
- Welcomed feedback on real-world experience and changing document management needs.

A hot topic this year was the advent of new cloud document management solutions, which particularly interested delegates from universities. The User Group comprised long-standing Document Logistix customers, such as an insurance company that has been on an eight-year journey from filing cabinets to paperless; and a housing association that presented to the Group in detail how it has expanded the use of electronic document management estate-wide across multiple departments. There were also Document Manager users and helpdesk advisors who had only been working with Document Logistix products for a few months, and were keen to hear about the development roadmap.

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HOW TO MANAGE GIFT AID TO MAXIMISE DONATIONS

According to a recent industry survey, 99% of non-profit professionals say fundraising software positively impacts the amount of donations collected, while 98% believe recordkeeping, financial reporting and workflows are also positively impacted by the use of fundraising software. However, despite the huge potential this software has to offer, just 30% of fundraising professionals are leveraging its power.

Document Logistix helps charities, third sector or not-for-profit organisations to secure the tax relief on every donation received with Gift Aid document management software.

Asthma UK chose Document Logistix to address the challenge of providing the accurate audit trails required to secure its Gift Aid tax claims. The charity decided upon Document Manager because of its flexibility, strong functionality and the system's integration into the charity's Raiser's Edge database. The software enables all incoming gift aid documentation to be efficiently scanned, indexed and linked to other business applications.

In order to meet their tight deadline, and also satisfy Customs and Excise audit, the bureau scanned approximately 175,000 gift aid forms within six weeks, providing Asthma UK with the ability to make claims for gift aid tax reimbursement for that year.

Thanks to Document Manager, Asthma UK benefits from:

- Elimination of unstructured paper records.
- Massive savings in document retrieval times.
- Easy integration with existing charity management systems.
- Improvement of Gift Aid audit trails.
- Elimination of paper, freeing up valuable office space.
- Users find the software very simple to use.

Gregory Yakub at Asthma UK said, "The Document Manager system provides Asthma UK staff with a fully secure and instantly searchable audit trail of every document related to each gift aid donation claim – potentially saving the charity hundreds of thousands of pounds per annum."

Read the case study in full:

www.document-logistix.com/case_studies_documentmanager_asthmauk.php

DOCUMENT MANAGEMENT FOR SPORTS CLUBS AND ORGANISATIONS

Research from the Sport and Recreation Alliance shows that adult memberships for sports clubs has increased by 21% since 2011. While that's great for the populations' fitness, it's adding to the paper mountain already being maintained by sports organisations up and down the country.

Profitability, fan loyalty, ticket holder, member and customer satisfaction are all high priorities for sports clubs. Electronic document management helps sports clubs and sports organisations in every aspect of their business and operations, from membership registration and ticketing, all the way through accounts, invoicing, and HR for club management, staff and players.

Expectations of systems performance run high when a business aspires to compete at the highest levels. A documentation management system with automated processes, approvals and workflow capability, smart databases and accurate search functions give sports administrators the edge and allow staff to concentrate on running the club rather than low-level admin tasks.

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https://feedburner.google.com/fb/a/mailverify?uri=DocumentLogistixDocumentManagementAdvice&loc=en_US

LEGAL SERVICES DOCUMENT MANAGEMENT SOFTWARE

Documents are the life blood of any law firm, attorney's office or legal department. A survey taken at the International Legal Technology Association discovered that 84% of law firms still rely on paper records for their official matter file. But despite paper being the storage media of choice, it's problematic in terms of cost, risk and inefficiency.

Document Manager Legal from Document Logistix enables law firms and solicitors to manage case matter, correspondence and client relations so that the legal process, workflow and audit trails are highly manageable. The solution is a sophisticated document management and automation facility, offering features that ensure:

- Secure document collaboration through versioning, comparison and check in/check out features.
- Accurate and highly efficient document production and management using merging and barcoding.
- Provides clients and partners with instant service by means of unattended document production.

Document Manager Legal combines in one place, using one database, all the different legal software applications required by a law firm. It continuously connects each data point, via the client profile, and transforms every person, task and business process into a proactive customer service agent. The results of electronic document management is a highly personalised and consistent experience across all channels, anytime, anywhere. Document Manager Legal improves client-facing productivity while back office operations become less of a burden on admin resources.

By using Document Manager Legal, Heald Solicitors' average filing times have been reduced to just 30 seconds, and document search times now average less than 15 seconds.

Read the case study in full:

www.document-logistix.com/case_studies_documentmanager_heald_solicitors.php

HR DIGITAL RECORDS MANAGEMENT

According to the Employee File Management Survey, published on HR Daily Advisor, paper-based record keeping is a real issue for HR departments. Its survey results reveal that:

- 84% of HR departments manage their employee files by hand and/or via a paper filing system.
- 67.3% say relying on paper was their biggest pain point.
- 54.1% feel they are experiencing “considerable growth” when it comes to the amount of documents they have to handle each year—for 9.5%, it’s getting out of control.

HR departments in large businesses handle thousands of P60s, P45s, P11Ds, contracts and many other document types each year. Typically, an employee file contains more than 30 documents, and that’s before you include other documents that refer to changes in labour legislation, regional variations, union and non-union classifications and other variables.

Electronic document management solutions enable HR professionals to reduce admin time by providing capability to capture, store and retrieve documents digitally and automate many process. HR digital records management eliminates the need for paper storage and automates many manual processes, so that the HR team can spend less time on admin and allocate more time to more productive matters.

Today’s HR digital records management solutions also integrate with other systems, such as payroll, to provide company-wide benefits and savings. Consider any critical HR task, from on-boarding, to performance review, disciplinary hearing or retirement: all related documents can be centrally stored, with audit trails, for simple management. Apply access permissions or retention criteria dynamically to simplify supervision.

Watch how Document Manager helps improve HR digital records management efficiency:

www.youtube.com/watch?v=GZEV2vVL7zY

THE PERFECT PARTNERSHIP: DOCUMENT LOGISTIX AND FUJITSU

The worldwide digital transformation trend is increasingly impacting upon the document management industry. According to research from the Aberdeen Group, the volume of documents and unstructured data is growing by over 30% per year, and organisations in industries like healthcare, banking, insurance and the public sector are struggling to reconcile the worlds of digital and physical data.

49% of business say their basic business processes rely on some form of paper documents. But the problem here is that using and processing documents in this format takes too long, a challenge cited by 39% of organisations. Therefore, it's not surprising that another study by IDC reveals that document challenges are robbing organisations of 21.3% of overall productivity, costing \$20k per employee, per year.

Many executives see the benefit of focusing on improving document processes, and that streamlining in this area could lead to a 36% increase revenue and a 30% cost reduction (IDC).

Document Logistix: making work flow

Document Logistix has helped companies and government organisations to take the journey from paper to digital efficiency in most sectors for twenty years.

Electronic document processes that began as the domain of the accounts department, today extends to every function within a business. Document Logistix' integrated digital document management solutions work across front and back office, from sales and procurement to HR, and from client services to finance.

The latest Document Logistix solutions tackle workflow efficiency head-on with automation that prevents bottlenecks and measurably improves productivity. New dynamic workflow design tools give users the unprecedented capability to revise workflow processes quickly and simply, without recourse to programming experts.

Fujitsu: unmatched uninterrupted versatility

To transform paper documentation into digital format, Document Logistix formed a strategic partnership with market leader Fujitsu. Its scanners are the most compact A3 desktop scanners on the market and offer unprecedented versatility:

- Forget size, Fujitsu scanners can handle anything from a small A8 size business cards, up to A2 and beyond.
- Paper thickness isn't an issue either, the scanners can cope with something tissue-thin up to thicknesses of 413g/m2.
- Mixed batches aren't a problem, and the scanners can easily capture information from plastic cards.
- Offering best-in-class performance, it's also possible to replenish documents mid-scanning without interrupting the flow.

Discover more about Fujitsu scanners:

www.youtube.com/watch?v=TklkNWqZeHM

EVENT: HOW EDM CAN EASE YOUR RECORDS KEEPING COMPLIANCE

The role of records management is to facilitate the creation and management of authentic, reliable and usable records, capable of supporting business functions and activities for as long as they are required. Retention schedules are set either by law, or by your organisational policies. Each policy or piece of legislation contains specific requirements, but largely they all cover:

- How to effectively maintain information so it is accessible and usable.
- Ensuring it is only kept for as long as required.
- Deploying adequate protection so information remains secure at all times.
- Facilitating the correct sharing of information.

The biggest piece of legislation that you must ensure compliance with is The Data Protection Act. It controls how personal information is used by organisations, businesses or the government and sets out data protection principles that companies must abide by. Additional legislation and guidance to be aware of includes:

- The Freedom of Information Act.
- Copyright, Designs and Patents Act.
- Environmental Information Regulations.
- Information Commissioner's Office (ICO) Records Management Policy.
- ICO Section 46 Code of Practice – Records Management.
- As well as industry specific guidelines, for example, retaining financial or medical records.

Effective records management will ensure that you have the right information at the right time to demonstrate your compliance, and make the right decisions. Good records management relies on a number of factors, including:

- Creating appropriate records.
- Capturing records in appropriate systems.
- Appropriate maintenance and upkeep of records.
- Regular reviews of information.
- Controlled destruction of information.

Who should attend?

This event is designed for senior information managers, including CEOs, CIOs, financial directors, HR managers and marketing managers.

What will they learn?

- Legislation you need to adhere to.
- The cost of non-compliance.
- Creating effective in-house records management policies.
- The secret to good records management.
- The importance of electronic records management.

Discover what it can do for your business by registering your interest in this event:

www.document-logistix.com/online_enquiry.php

EVENT: GETTING STARTED WITH ELECTRONIC DOCUMENT MANAGEMENT

The volume of information produced and stored by organisations is growing at a phenomenal rate; IDC calculates that the amount of information being generated doubles every two years. However, this growth is making it harder to effectively and securely store information, while still providing easy access to those who need it.

The answer is an electronic document management (EDM) system, also known as a content management system, records management, information management system or enterprise portal.

Whatever term you use to describe it, the fundamentals are the same - to manage different kinds of documents, such as invoices, sales orders, photographs, phone interviews, or videos, using computer programmes and storage. Your EDM system exists to make your life easier by:

- Capturing and loading information into the system.
- Storing and archiving files and documents.
- Supporting and administering any compliance or legal requirements.
- Search tools that enable the finding and retrieval of information.
- Security and access controls to stop unauthorised access to data.
- An audit system to track of the life-cycle of a document.
- A workflow system that allows the automatic routing of documents to people or departments.

But before you get carried away implementing a shiny new system, you need to have a robust, informed strategy in place to ensure your EDM is employed effectively throughout your organisation, and by which to measure success.

Who should attend?

This event is designed for senior information managers, including CEOs, CIOs, financial directors, HR managers and marketing managers.

- Bottom-line benefits of electronic document management.
- Conducting an information flow audit.
- Making document life cycle decisions.
- Creating an EDM strategy.
- Important considerations for your EDM solution.

What will they learn?

Discover what it can do for your business by registering your interest in this event:

www.document-logistix.com/online_enquiry.php

EVENT: WHAT ELSE CAN YOU DO WITH ELECTRONIC DOCUMENT MANAGEMENT?

So many business processes rely on documents to run smoothly; it's the reason that information is said to be an organisation's most valuable asset. Document management is essential to protect this information. However, an inadequate solution, or one that's poorly implemented, can cause great inefficiencies; industry research shows that knowledge workers can waste 25% of their time – that's one day every week – searching for information.

Historically, workflow has been complex, difficult to implement and virtually impossible to change once deployed. So how can we make document management more dynamic to enable information to flow more freely?

Dynamic Workflow Designer from Document Logistix enables users with no technical background to create workflows dynamically through a visual tool to eliminate the high-cost of workflow programming.

What the session covers

Attend this event and you will discover why Document Logistix offers more than a basic electronic document management system. During the session we will explore the following functionality:

- Review processes simply through 'drag and drop' updated rules-based workflows.
- Assign any number of labelled workflow checkpoints with sub tasks according assigned roles.
- Use rules to prevent work passing to the next stage until each checkpoint requirement is met.
- Assign alerts and email messages to flag issues or ask for comments.
- View an automatically generated full audit trail at the end of a workflow process.

Dynamic Workflow Designer can be used to create workflows for any business function, from manufacturing to HR, warehousing and distribution, professional services or retail, and 83% of users see a positive ROI from their investment.

Discover what it can do for your business by registering your interest in this event:

www.document-logistix.com/online_enquiry.php

EVENT: WHO BENEFITS FROM DOCUMENT MANAGEMENT?

Slow workflow affects customer satisfaction and reduces profits, and as today's consumers, clients and suppliers demand a faster, more personalised service, you need systems that deliver the speed and accuracy to promote satisfaction and loyalty.

Through effective document management you can capture information, track, analyse, understand and report on key performance indicators, while being sure that you are dealing with the latest version of the truth for added confidence in the decisions you make or information you pass on.

Document Manager from Document Logistix is a scalable, flexible platform that helps to eliminate the use of paper, improve records management and automate business processes. The solution can be used to create workflows for any business function from manufacturing to HR, warehousing and distribution, or professional services, across industry sectors ranging from health to finance, construction, law enforcement and the public sector.

What the session covers

Attend this session and you will discover how Document Manager allows you to work the way you choose. Simply select the functionality you need and through the simple-to-use but rich and intuitive user interface, you can be sure of a rapid return on your investment. During the session we will share:

- How to perform full text search across all stored content.
- Version control for document authoring.
- Integration for email and other applications.
- Audit trail.
- Security and encryption.

Whether you are looking for a simple document image archive or a complex business process automation solution with workflow, Document Manager offers the total solution in a variety of configurations to meet your business requirements. 400 satisfied customers trust Document Manager; will you join them?

Discover how Document Manager will benefit your business by registering your interest in this event: www.document-logistix.com/online_enquiry.php

EVENT: WHERE ARE YOU ON THE ROAD TO DIGITALISATION?

The modern workplace strives to be paperless, but it's an ideal that can be difficult to achieve. According to a recent industry survey of over 2,000 office workers, 92% admit to still printing on a daily basis, with nearly half printing over ten pages per day.

Technology can play an important role in relieving the paper burden. We've come a long way since the filing cabinet was invented in the 1880s. It's a journey that took offices through servers, to PCs and the first electronic document management systems (EDMS) a hundred years' later, which introduced the concept of automating the process of document retention and the timely destruction of records.

Today, progressive companies are exploiting EDM to the full by integrating it with their business processes and functions, such as dynamic workflow design, automated workflow and business intelligence dashboards.

What the session covers

Attend this session and you will hear the story of large multi-site organisations that went from filing cabinet to automated workflow in just a few years.

- Discover the journey it took, celebrating the highs and overcoming the challenges.
- The functionality deployed, and the benefits it provides users with.
- Lessons learned and how they can be applied to others organisations.
- How it aids with compliance management.

Discover what you can learn from their experience by registering your interest in this event:
www.document-logistix.com/online_enquiry.php

EVENT: HOW CAN INTEGRATION HELP YOU STAY AHEAD?

Information is used throughout your business. However, the majority of companies only use data at an operational level to help keep the business running, while others start to analyse it so they can understand what it means. But it's the most successful businesses that take it one step further, using their data to inform critical decisions and drive the business forward.

In the world of HR, your job is to shape the talent within your company, making them into the leaders of tomorrow and growing a culture that is beneficial to your customers' needs. Here, analytics plays an important role, helping you to identify talent quicker and nurturing it to drive the best value from it.

To help, we've teamed up with Midland HR, an exceptional partner that has specialised in business intelligence (BI) software for over 10 years, and has a proven track record with over 750 successful implementations.

What the session covers

Attend this session and you will hear from experts at both Document Logistix and Midland HR, gaining valuable insight into how the HR landscape is expected to shift over the coming years, best-practice advice for staying ahead of the changes, and how our combined solutions can help provide you with a competitive edge for:

- Talent management: attract, nurture and retain the right people to elevate business performance.
- HR: support your people to do what they do best, with simplified, streamlined HR.
- Analytics: act smarter and shape future success with our powerful BI solutions.
- Payroll: award-winning software and services for all your payroll needs

Our end-to-end HR management software delivers automation where it is needed and enables HR teams to streamline administration and processes, ensuring your business enjoys optimal performance and success.

Discover how our partnership can benefit you by registering your interest in this event:

www.document-logistix.com/online_enquiry.php

IDENTITY



Where possible the Document Logistix logo should be used in full colour in the above format.



When single colour production is only available the entire Document Logistix logotype should appear in Document Logistix Green or Grey. Ensure the shadow of the icon is the correct colour in comparison with the background.



If necessary, the entire Document Logistix logotype may appear as a reversed colour logo on a black or dark coloured background. When reversing the logotype, be sure to maintain sufficient contrast. Avoid complicated backgrounds that compete with the Document Logistix or reduce its legibility. Ensure the shadow of the icon is the correct colour in comparison with the background.



To ensure legibility and to prevent any obstruction of the Document Logistix logotype, always maintain a minimum distance between the Document Logistix logo and any other element (graphic, type, line, or edge of page). The clearance area around the Document Logistix logo on all four sides should never be less than the height of the letter 'D' (see illustration above).



38mm

To ensure legibility, never reproduce the Document Logistix logo less than 38mm.



If necessary, the entire Document Logistix logotype may appear as a reversed white logo on a black or dark coloured background. When reversing the logotype, be sure to maintain sufficient contrast. Avoid complicated backgrounds that compete with the Document Logistix or reduce its legibility.

IDENTITY



PMS: 390
C: 40 M: 0 Y: 100 K: 0
HEX: #B1C800
R: 177 G: 200 B: 0



PMS: 446
C: 50 M: 30 Y: 40 K: 70
HEX: #3E4743
R: 67 G: 71 B: 67

When using the green for text, please ensure you use the revised green using the breakdowns below. When using the logo green for small text, it becomes very difficult to read.



C: 40 M: 0 Y: 100 K: 30
R: 136 G: 156 B: 5

DIN

The DIN font family should be used for the main content of any Document Logistix presentation material. If 'DIN' is unavailable, use 'Arial' throughout.

DIN Medium

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz

12345678910

DIN Condensed

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz

12345678910

Company Profile: Document Logistix 50 words

DOCUMENT LOGISTIX: MAKING WORK FLOW

For twenty years Document Logistix has delivered affordable and scalable document management software that eliminates paper, improves records management and automates business processes. With over 400 satisfied customers, Document Logistix has the experience and expertise to deliver software that powers the operations of some of the world's most demanding, high document volume businesses.

www.document-logistix.com

Twitter: @DLXMK

Spokesperson Profile: Dan Wajzner 50 words

DAN WAJZNER, MANAGING DIRECTOR, DOCUMENT LOGISTIX

Dan has a technical mindset, having studied various degrees in biochemistry, genetics, computer science and research in computer vision, and working for technology-centric management consultancies, and holding the position of Group CTO. At Document Logistix Dan is responsible for ensuring that its products and services deliver real, demonstrable value to the company's clients.

LinkedIn profile: <https://uk.linkedin.com/in/dan-wajzner-72bb321>

Key Solutions: Business Editions 50 words

DOCUMENT MANAGER BUSINESS EDITION

Streamline business processes, and centralise the capture, index, storage and sharing of documents and data. The Business Edition is pre-configured for easy installation, suitable for up to 15 named users and is shipped with six pre-configured drawers. As a feature-rich document management package, it delivers ROI straight out of the box.

Download the brochure to discover more:

http://www.document-logistix.com/assets/downloads/Business_Edition_Brochure.pdf

DOCUMENT MANAGEMENT SOLUTIONS FOR BACK OFFICE SYSTEMS

Digital document management and workflow software helps businesses to automate a wide range of back office processes to improve efficiency. Document Logistix offers three key solutions:

Read the Direct Wines case study:

- HR Document Management: to streamline recruitment documents and HR processes.
- Accounts Payable Document Management: to accelerate payment processes.
- Managing invoices by Document Management: to streamline business processes.

http://www.document-logistix.com/case_studies_documentmanager_wines.php

SO MUCH MORE THAN JUST DOCUMENT MANAGEMENT

Document Logistix provides critical business benefits generated by improved digital document management, enabling you to:

- Gain faster access to information.
- Improve decision making.
- Ensure tight security.
- Maintain productivity.
- Manage compliance.

Read case studies in full: www.document-logistix.com/casestudies/



Graphic 1



Spokesperson: Dan Wajzner, MD



Graphic 2



Graphic 3



Customers and case studies



Kim Kuykendall, USA



Tim Cowell, CTO



20
**YEARS OF
INNOVATION**



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