

CaelumOne

Cloud Based Data Capture and Content Management



Why would I want my documents in the *Cloud*?

Content sharing and document management systems deployed in the cloud can offer unique benefits for small and mid-sized businesses

- ✦ **Sharing and collaborating on documents inside and outside of the business**
- ✦ **Accessing and uploading them from anywhere and on any device**
- ✦ **Searching information from anywhere - work, home or on the move**
- ✦ **Supports a disaster recovery plan for your data**
- ✦ **Lowers your infrastructure and maintenance costs**

Why would I want my documents in the Cloud?

Just like a library, it's much easier to share things if you put them somewhere that other participants can access easily. Putting documents in a cloud system, setting who can access it, and sending them a link is much easier than trying to give them access into your network and your servers, or sending back-and-forth copies by email. It may also be that the cloud "librarian" is more experienced and more accountable than your own IT staff, and that the electronic "library building" (or cloud data-center) is actually a safer and more secure place to store important documents than your own premises. It is certainly the case that the very act of placing documents in this cloud library will focus the mind on how it should be classified or tagged in order to find it again, and who should have access rights.

It is also the case that most libraries will take care to store only one copy of each book, as the shelf space for multiple-copies is bulky and expensive. The same is true of electronic documents - and you will only have "one version of the truth".

It's also much quicker to get a content store up and running in the cloud, with no need to worry about servers, operating systems and back-up. If you have remote, field-based or travelling staff, it's also much easier to connect to a cloud system from a Smartphone or Tablet.

Unlike a library, where writing comments in a book, or even adding new chapters is somewhat frowned upon, a cloud content store can be much more interactive – if you so choose – allowing multiple participants to collaborate on document creation and refinement. Having multiple commenter's work on a single copy is much easier than exchanging multiple marked-up copies by email, and you will always have a record of each version created.

Why CaelumOne Cloud Based DM Solutions?

- Instantly Connects other sites or branch offices
- Accessible documents from home or on the move
- Safe document sharing with stakeholders, partners and clients
- Quick and simple to set up
- Ideal for joint projects
- Encourages collaboration and feedback with employees and clients
- No extra load on IT

Can I trust cloud security?

Much like managing your bank account online, you need to take security threats to your cloud content seriously and follow sensible steps on passwords, secure connections, encryption, etc. In many ways, this is simpler than configuring the firewalls and anti-viruses that protect your on-premise network. Enabling access from mobile devices uses the same security mechanisms as from the office, so is simpler and potentially more reliable than punching VPN holes through your firewall.

Just as you would not trust your money to an online bank with no history and no reputation, you need to be sure you know who you are dealing with when it comes to entrusting your data to an online storage provider. Do not be put off by stories of hacked data and system outages: many on-premise systems are just as vulnerable, especially from internal employees and out-sourced IT support staff. Breaches of in-house systems are much more likely to go un-reported.

According to ECM surveys, employees in most businesses are already making use of consumer-style cloud file-stores and file shares like Box, Dropbox, and Evernote in **an uncontrolled way**, and with very basic security, particularly at the “free” end of their offerings. Consolidating and managing cloud services proactively within an approved business-strength system like **CaelumOne** will allow you to prohibit use of these unmanaged “*squirrel stores*”.

In some regions, or in certain sectors such as government or healthcare, compliance requirements may come into play for holding sensitive information in offshore data centers. If this applies to you consult with CaelumOne and we will provide additional security documentation from our service provider for the mechanisms for reassurance in these cases.

CaelumOne Software Key Features Include:

- Converts documents to web-ready format and publishes in one step
- Converts into searchable HTML files using a powerful natural language search engine
- Documents retain original formatting and are viewable with any browser
- Printing of documents can be enabled or disabled to print a single page or an entire topic
- Table of contents allows easy navigation of large documents
- Convert documents from all common applications
- Enhance documents with multimedia content, (.avi files, mp3s, etc.)
- Ability to email files directly into the system searchable as documents

How will it save me money?

Many of the financial benefits of CaelumOne cloud content storage relate to making staff more effective, improving project coordination, reducing time spent searching for or duplicating information, and improving the quality of decision making. However, there can also be benefits from improvements to the process flow - speeding up document routing, shortening cycle-times, preventing delays, discontinuities and errors, and improving customer satisfaction. This is particularly true where paper forms and associated documents are part of the process flow. Dealing with any claim, bid-process, approval or customer on-boarding through the postal system is time-consuming and frustrating.

CaelumOne document management systems include workflow and business process modules, which are generally very effective, but these are not the only way to achieve process efficiencies and cost savings. The simplest of electronic document “in-folder” to “out-folder” workflow can still be hugely more efficient and less error-prone than paper-based processes, and it doesn’t need customized and hard-to-maintain interfaces to existing finance, order-processing and HR systems. For example, handling inbound invoices (paper or PDF) can work with a “scan-to” folder, a “matched-and-ready-for-approval” folder, an “approved” folder and a “paid” folder. Arrival of an invoice in any of these process queues will trigger an alert to the appropriate employee or employees. Equipping the invoice-processing clerk with two screens, one for the scanned invoice and one for the finance application will allow simple cut-and-paste to be the integration mechanism between the two systems. Accounts payable enquiries will involve a simple search across the folders to show up the current status.

More importantly, managers can approve the invoice wherever in the world they happen to be as long as they have access to the cloud. For better or worse, the excuse of the “lost invoice” will be less likely to be genuine. Inspection reports or returned goods correspondence can be filed alongside, giving the purchasing clerk, and anyone else who needs to know, a full picture of the transaction history in one place.

Areas for cost savings within the cloud:

- **Reduced printing and photocopying**
- **Less postage and stationery**
- **Frees up cabinet floor space and avoid temp costs for filing and shredding**
- **Faster and cheaper audits**
- **Lower server and back-up costs**

CLOUD SAVINGS

Conclusion and Recommendations

Cloud-based document storage and sharing has become very popular both in the consumer area and within business (although it's not always used "officially" within businesses – *(research shows that rogue usage of free online file-sharing software is prevalent)*). However, sharing in a business context also needs a degree of management – who can share and edit which document types, on what topics, and with whom. Over and above that, the filing plan needs to be appropriate and intuitive if everyone is to know where to store things, and indexing is needed so that content can be easily found in the future.

Putting these document management concepts in place greatly enhances the efficiency of any business, but utilizing the CaelumOne cloud solution provides particular benefits. It can be quickly deployed, and will be readily accessible by project partners, business agencies, customers, or clients, including those who are out-and-about with a mobile device. CaelumOne controlled cloud document system is usually safer and more secure than one provided by local IT resources as it can be difficult to acquire security skills and keep them up-to-date, and perhaps your IT staff should not be included in your sensitive document distributions anyways.

CaelumOne Recommendations:

- *Consider where your most important business documents are stored at the moment, and how easy it is to access them, both for those who shouldn't have access, and those who need access from wherever they are working. If they are held as paper copies they are likely to be even more difficult to access, as well as taking up useful floor space.*
- *Think how useful it would be if you could quickly and easily set up a shared document area accessible only by trusted internal staff and also by external partners, project members, customers, or professional agencies.*
- *Consider whether there are new business models or customer services you could offer by providing electronic submission to you of documents via a shared but secure area in the cloud, or how you might deliver documentation sets to others via a shared space.*
- *Look at a number of basic document-centric processes in your business and see how eliminating paper and defining a simple electronic workflow could improve productivity, speed up the end-to-end process, and reduce print costs and paper-storage space.*
- *Look out for unofficial use of file-sharing and cloud storage applications, explore why they are considered useful and productive, then aim to provide a business-strength system as a safer and more controlled alternative.*

Contact CaelumOne to learn more about how our cloud based solutions help create new opportunities for collaboration.



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