

Document Management Case Study

Summary

F&S Property Management receive a lot of mail via the post and by email. They need to file these documents securely for a number of years and retrieve them when required.

About the client

F&S Property Management is an independent, long established firm of Chartered Surveyors, specialising in residential property management, and in particular the management of leasehold properties and portfolios of residential investments. With two Partners, Michael Roberts and Nigel Javan, both of whom are Chartered Surveyors and members of the Institute of Residential Managing Agents, the firm employs a total of thirteen staff.

They act for Residents Management Companies, Right to Manage Companies, Freeholders, Developers and Investors, and manage blocks of flats, estates of houses, and mixed schemes of houses and flats.

The Problem

Most incoming documents are still received in paper form via the post. Document types include:

- Queries on leases for individual flats within each block
- Letting of flats including leases and queries on leases
- Client correspondence
- Selling of properties
- Insurance
- Day to day maintenance
- Cleaning and maintenance of communal areas
- Accounts documentation including supplier invoices & correspondence

Handling and filing these documents takes considerable effort. Documents often have to be retained for a number of years. This can lead to misfiling and loss. Increasingly, emails are also received and these were held in Outlook in-boxes where they were only available to the recipient. Space constraints meant that documents over a year old were filed away from their Head Office and were therefore not easy to access.

The Solution

File Stream Document Management was installed on all user PCs. A Kodak i1220 scanner was also installed to scan all incoming mail and other documents which converts them into image files. Once scanned into File Stream all these documents are filed into electronic cabinets together with emails, MS Office files etc.

Benefits

- Less office space required as all paper documents can be destroyed after scanning, which in turn means the office is less cluttered.
- Documents older than one year no longer have to be stored offsite which means they are immediately available, thus cutting out delays in retrieval, which in turn improves the service to clients.
- Important emails are now available to all staff.
- Cost savings due to being able to dispense with offsite storage.
- Filing of documents through scanning and indexing is much quicker and easier than manual filing and prevents document loss.
- Document retrieval for users is much quicker than before as all documents are now held electronically and easily found using index values previously entered.
- A backup of all documents is now possible which can be kept off-site and mitigates the potential loss of data in fire or flood.
- The documents are also held in encrypted format in File Stream Document Management, which is added protection in the event of theft.