

Case Study

JULY 2010



Reduced storage of paper in the office and deployed electronic document management

The Agency had a 35 year archive of contracts. Nearly 1/2 million of these pages were scanned and they have now implemented an ongoing scanning system with Pearl Scan

Company: The Agency

Industry: Media/Agents

Profile: Founded in 1995, The Agency represents screenwriters, directors, playwrights, composers, and children's authors & illustrators.

Key drivers: To have a paperless office, efficient document management control and to reduce storage of paper in the office

Based in Holland Park, London - founded in 1995, the company has grown steadily throughout the new millennium, employs professional agents to represents screenwriters, directors, playwrights, composers, and children's authors.

Too much paper and not enough space

The Agency's staff worked with an ever expanding, paper-based, contracts management system which included a large number of filing cabinets and occupied a lot of office space. Some of the old contracts were stored at another storage location and some with an off-site storage company. This was resulting in high storage and retrieval costs. The paper based filing system also provided no backup of the information contained on the contracts, and was therefore dangerously exposed to the risk of disaster.

The Agency's management decided that an electronic document management system was required to support the continued growth of the business and its resources.

Milestone Completed

Collections	1
Scanning 1/2 million pages	2
Detailed Indexing	3
Full OCR	4
Document Management System	5
Company Wide Installation	5
Company Wide Training	6

Selecting a Document Scanning Service Provider

The Agency knew that a better and more efficient storage and management of their contract documents was required and they wanted to find a company who could service this requirement and digitise their 35 year old library and also provide easy to use an going document management system in a cost effective way.

The Agency's management invited various companies for presentations and assessed the required services and solution. The senior management of the Agency was involved in selecting the required service provider as the contract documents are the key important driver for their business therefore a careful selection was required.

After various meetings and presentations, Pearl Scan Solution was selected as a preferred solution provider to scan the backlog of around 1/2 million pages and to deliver a bespoke document management system.



Our Approach

During our presentations and demonstrations with the Agency we exhibited similar projects we had delivered in the past for other clients, a bespoke presentation of the actual solution was then organised. A proper fully functional system was setup as a proof of concept. The agency's senior management found this very useful and various ideas from both sides were discussed and further fine tuning was added to the look & feel. The required index/search fields of the database were setup with added flexibility of an 'OCR search'.

There were two fundamental requirements;

1. **the scanning and indexing of the contracts' library**
2. **the implementation of the on-going scanning & management system**

By working together with the Agency's management team, a careful project plan was drawn up by Pearl Scan to deliver the required service and system.

Phase 1. The library scanning

As the hard copy documents were stored at three different locations we planned to scan the documents in batches. The contracts which were stored at the main office that were taking most of the office space, were collected first. Pearl Scan organised convenient dates and time for each collection. The boxes were then brought to Pearl Scan's state-of -the-art scanning facility where the documents were first catalogued, then prepared - staples, clips, tags etc were removed. Contracts were digitised, cross indexed, OCR recognition was then applied to convert the contracts into a fully content searchable format and a database was created and further categorised so various types of contracts can be easily filtered. The scanning process was successfully completed and the disks were supplied and copied onto the Agency's newly bought File (DM) server.



Phase 2. Implementation of document management system

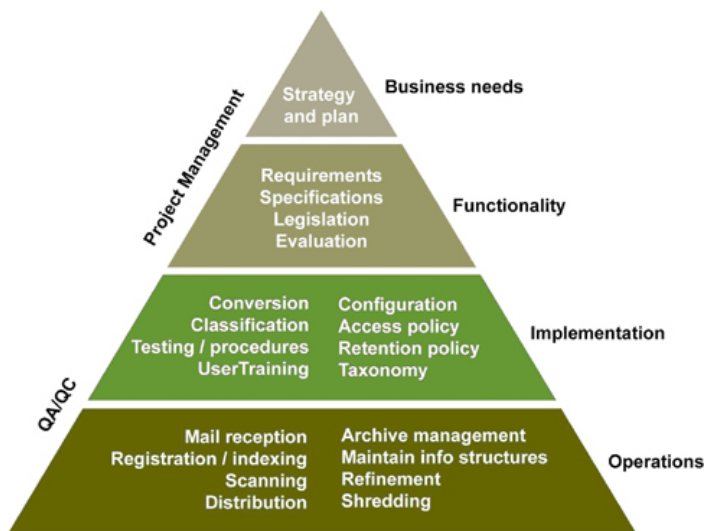
LazyWorks document management system by Pearl Scan's EDMS division was customised to incorporate the required functionalities, optimisation of the database and contain a full OCR content search facility. Few added functionalities and database changes were required to the system which Pearl Scans' developers incorporated into the software.

A central database was setup to create a central document repository, the system was setup at the two offices which were networked by laser link and connected to the central server to access the documents.

Users from both offices were added to the system and required access levels were granted from read-only users to the super users.

Upon completion of the system installation, training sessions were scheduled and various users of the system from the top down were divided into two main groups which were read only and progressive users.

- **Complete scanning of all back file contacts**
- **Setup of centralised document retrieval system**
- **Company wide training**



After the successful deployment of Pearl Scan's EDMS, the system has now been rolled out to the royalties department where it is used to more effectively manage the Agency's clients' financial information

The achieved objectives

- **Central storage and management of documents**
- **Instant access to any required contract**
- **Reducing requirement for physical document storage**
- **Tight control of document security**
- **Full disaster recovery**
- **Records are kept up-to-date**
- **Available from any desktop or remote location within seconds**

"We are very pleased with the scanning and document management solution delivered by Pearl Scan Solutions, there was always a willingness to meet our requirements throughout the entire process. All of our documents are now securely stored on our file server and access is only a click away. Very happy with the service and end product"

Monique Campbell (Company Legal Secretary)

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