

Document management for the **future-focused business**

Efficiently and securely storing
information and workflows

In the post-pandemic world of remote and hybrid working, an increasingly paperless environment is **evolving**.



44% of people in the UK now work from home remotely or have a hybrid set-up.¹



Production of office print paper has fallen by **almost a third**.²



The amount of digital data businesses create is increasing by **two-thirds every year**.³



16% more remote workers have applied for a job because of the company's reputation for using great digital technology.⁴

For people to be able to work efficiently and collaborate with anyone, anywhere, digital documents must be easily and securely shared and stored.

Future-focused companies have big ambitions: to retain the best talent, exceed sustainability targets and run cost-effective workspaces. For these to be realised, content management and document workflows call for digital transformation.

The way businesses are managing and sharing documents is changing.

And it's not hard to see why.

Sensitive data is under attack.

Remote staff are frustrated.

Physical storage is not up to scratch.

The entire lifecycle of your documents is ready to be transformed by a single enterprise document management system.

Enhance your **security**

Patient records, staff payroll, customers' files: every bit of data needs to be kept safe from bad actors seeking to breach, disrupt and steal. How confident are you about your documents' cybersecurity defences?

Cyberattacks are a serious problem for today's businesses, big and small—and it's only getting worse.

There were 2.39 million instances of cybercrime affecting British businesses in the last 12 months.⁵ About a third experience a cyberattack as often as once a week.⁶

By the end of 2023, 33 billion electronic records are predicted to have been stolen globally.⁷

There is a high price to pay for companies whose cybersecurity fails to measure up; UK organisations pay an average of £3.4 million for each individual data breach.⁸

A woman with short dark hair, wearing a white button-down shirt and a black tie, is looking down at a tablet device. She is standing in a server room, with rows of black server racks visible in the background. The lighting is dim, with some light coming from the server racks and the tablet screen.

2.39 million

Instances of cybercrime affecting British businesses in the last 12 months.⁵

How document management software can **enhance your security**



With document management software, you receive a secure digital repository that safeguards your assets and helps shield you from the legal liabilities, reputational damage and financial losses that lapsed cybersecurity can bring.

Decide who sees what

Avoid private information being left on the printer or the bus, or discovered online in folders open to anybody.

You can set access controls and set permissions so that only authorised users (individuals or teams) can see and share what you want them to.

Prevent uninvited modifications

A document can quickly lose its accuracy and authenticity once amendments are made to it, whether done maliciously or with the best intentions.

Anti-tamper measures avoid information being modified beyond set parameters and electronic signatures guarantee that it is the original version.

Protect against data loss

Once information is lost or corrupted, a lot of time and money can be spent trying to retrieve and repair it.

If drive failure occurs due to hardware failures, cyber-attacks or unfortunate twists of fate, automatic backup storage ensures your data can still be recovered.

Improve your **productivity**

High productivity means increased profitability, giving your business the means to grow and scale. It can also mean higher morale and increased innovation, delivering opportunities to attract and retain talent, and to gain a competitive edge. Are efforts to boost efficiency gaining ground?

As working some or all of the time from home has become the norm for almost half of the nation, expectations to have information at our fingertips has become higher.

About 50% of people would now quit their job due to frustrations with outdated technology, with 45% blaming it on being less productive in their role.⁹

With the right tools, 30% of remote workers say they can do more work in less time.¹⁰

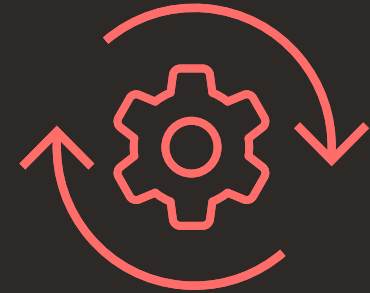
Since the pandemic, there has been a 44% increase in the use of virtual collaboration tools¹¹, and collaboration in the Cloud is expected to grow by more than 13% in the next five years.



50%

of people would now quit their job due to frustrations with outdated technology, with **45%** blaming it on being less productive in their role.⁹

How document management software can **improve your productivity**



With document management software, you and your people can work more efficiently, allowing automated processes to alleviate some of the workload whilst supporting more effective, collaborative work no matter where and when your teams want to come together.

Make insight-driven decisions

With staff potentially spread across multiple sites, at home and even in different territories, it's crucial to have as much visibility as possible of the flow and sharing of documents across the business.

Dynamic dashboards allow you to react to changes in performance indicators in real time, supported by scheduled reports with regular updates, to assist any document management decisions being made as informed as possible.

Support virtual collaboration

Some documents are not static or evergreen, needing small tweaks now and again, or a total refresh. If multiple people or teams are involved, the managing of how this gets done without inviting error or oversight can be tricky when working in different locations.

Work together with peers and partners on live documents, no matter where you are, tracking any changes, assigning tasks as you go and feeding workflows with the right information.

Automate core processes

Automation means some tasks can be performed in the background, saving time and allowing people to focus on higher value opportunities.

Make the importing of electronic information as efficient as possible, with streamlined indexing and seamless integrations with third party software.

Optimise your **storage**

The modern storage solution must be able to accommodate terabytes, petabytes and exabytes that far exceeds the mere gigabytes of yesterday. Yet such sizable storage can make no room for error or downtime. Can you trust where you keep your documents?

The average medium-sized business is said to use 10,000 pieces of paper annually, wasting much of it, and storing what's left in filing cabinets taking up expensive square footage.

But now, data servers are increasingly carrying the weight of the vast amounts of information that must be stored for practical purposes, posterity and regulatory compliance.

In the US and UK, 57% of data is currently stored in the Cloud, and 43% percent stored on servers on the premises.^{[12](#)}

Gartner predicts a much higher migration to the Cloud, estimating 85% of businesses will adopt a cloud-first approach by 2025.^{[13](#)}

In the US and UK,

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data is currently stored in the Cloud, and **43%** percent stored on servers on the premises.^{[12](#)}



How document management software can **optimise your storage**



With document management software, you and your people can work more efficiently, allowing automated processes to alleviate some of the workload whilst supporting more effective, collaborative work no matter where and when your teams want to come together.

Decide which information is stored where

The days of complicated colour-coded filing systems are over. Some documents need to be kept close at hand for fast retrieval, while others can be stashed away, safely, for peace of mind.

Keep documents where you need them most, whether it's within primary storage or in a backup location. Rather than being kept in a database, documents are located in separately defined storage with options for customisation and grouping, so you'll always know where to find what you need.

Make documents accessible to non-staff

Compliance, staff resource and physical location mean it's not always possible for customers to simply drop in and get the information they need.

An online portal allows for an enhanced customer experience by providing access to information such as invoices or test results, or curated into digital binders. Documents can be viewed as read-only to support security, with a few simple steps within the company website for a smooth user journey.

Utilise infrastructure you can trust

Businesses have lost countless precious documents over the years—buried within archaic filing systems, accidentally thrown out or trapped on a failing server.

By using data centres in different regions and copying to multiple disks, large-scale accessibility failures can be avoided. System data is maintained across secure storage locations, so the information you need is always to hand online.

Introducing Therefore from Canon

ThereforeTM
PEOPLE PROCESS INFORMATION

Canon

Why choose Therefore as your document management software?



Security above and beyond

Data is stored and backed up in our local data centres.



Access anywhere

View files from any web browser or mobile.



Locate documents easily

Find and save information in the most logical manner.



Remote collaboration

Work together in real time with Microsoft OneDrive integration



Audit trail and version control

All versions are kept in the system with trails of all document touch points.



Automated and digitised processes

Automate any business process for expedited approval and full traceability.



Easy set-up and integration

Therefore Online integrates with your Microsoft® Office 365 applications out of the box.



Real-time business analytics

Get critical information to detect bottlenecks in your daily operation.

Discover some of Therefore's **game- changing features**



Microsoft Teams integration

Subscribe to receive notifications about changes to workflow processes.



Therefore Smart Capture

Set up multiple queues to separately process different types of documents.



Therefore Dynamic Web View

Seamlessly edit in Microsoft Office Export, send, and print documents.



REST Calls in Therefore

Send documents via REST to third party web services.



Therefore Content Connector

Monitor and download documents from external services.



Case Study

The company

Helping one in five UK workers with workplace pensions, the company is one of the largest workplace pension providers in the country.



Challenges

Document disorganisation

The business received numerous paper documents daily, ranging from contracts and invoices to client correspondence and legal documents. These documents often arrived in various formats and sizes, making it challenging to maintain order and consistency in their physical storage.

Time-consuming retrieval

Locating specific paper documents within the vast archives was a lengthy, cumbersome process. Employees had to sift through stacks of paper, which resulted in wasted hours, delayed responses to client requests and potential errors.

Data security concerns

The physical nature of paper documents posed significant security risks. The business had concerns about unauthorized access,

document loss, and the inability to track who had viewed or altered sensitive information, potentially compromising client confidentiality and regulatory compliance.

Limited accessibility

Collaboration and remote work were hindered by the reliance on paper documents stored in the office. Staff members often had to be physically present to access crucial information, restricting the business's ability to adapt to modern work practices.

Archiving challenges

Managing archived documents, particularly those required for compliance and auditing purposes, was a logistical nightmare. Ensuring the integrity of archived files and the ability to retrieve historical data accurately was an ongoing challenge.

Solutions

Document scanning and digitisation

SOS Systems helped the business digitise their paper documents systematically. This process involved scanning, indexing, and categorising documents, creating a structured digital repository.

Advanced search and retrieval

The document management system offered by SOS Systems features powerful search capabilities, allowing employees to quickly locate and retrieve documents with keyword searches and metadata filtering.

Enhanced security measures

SOS Systems implemented robust security protocols, including encryption, access controls, and audit trails, ensuring that sensitive documents were protected from unauthorised access and tampering.

Archiving and retention policies

SOS Systems assisted the business in establishing comprehensive archiving and retention policies, ensuring compliance with industry regulations while efficiently managing historical data.

Results

Efficiency gains

Document retrieval time has reduced significantly, leading to improved response times to client inquiries and more efficient internal processes.

Enhanced security

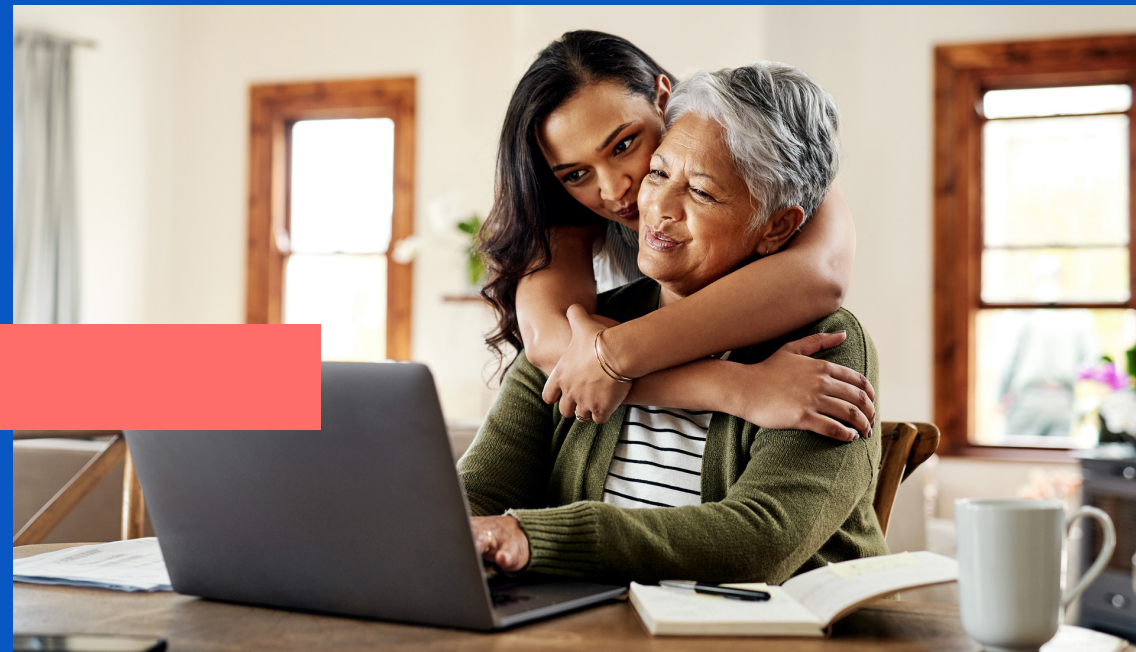
Sensitive client information is better safeguarded, and document access is closely monitored, mitigating security risks.

Increased accessibility

Employees can now access documents remotely, supporting flexible work arrangements and facilitating collaboration.

Streamlined archiving

The business has established a well-organized digital archive, making it easier to manage historical data and comply with regulatory requirements.





SOS Systems is a leading provider of print and document management solutions in South East England. ISO9001 2000 accredited, we are one of a select few Canon Platinum Partners in the UK.

We help customers nationwide achieve their compliance obligations and digital transformation objectives through a portfolio of innovative print software and services. From secure print management to e-Signature and Accounts Payable solutions, everything is backed by our Prince2 certified professional services team.

Find out more about how SOS Systems can help you with your document management needs.

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