

LEE BARON: Case Study.

The role of the document management system (DM) in a property management business is usually perceived as reducing filing space and enhancing security, and rapid inter and intra office sharing of documents.

John Jackson, IT Director at Lee Baron Chartered Surveyors in London, wanted much more than that. His vision was to tie DM to Lee Baron's QUBE Property Management Software so that staff in the property management department and purchasing could view electronic documents by clicking on a button in a QUBE screen.

As John notes, "By integrating with QUBE, the storage of property matters are now linked to the property and not to the individual secretary or surveyor etc. The information is located where it belongs. Softology have all the toys for integrating documents with QUBE and our staff don't even realise that they are using two discrete pieces of software".

"But that was not enough," John continues, "we had to have instant recall of documents, and documents include CCTV footage, photographs and emails, and we had to have the ability to search the text in scanned pages."

Softology's DM system addresses these needs out of the box, and does so in a very straight forward and extensively configurable way.

John observes, "People are naturally resistant to change and the key to implementing DM successfully was to make it as easy as possible for them to use, and use in favour of paper. Moreover, our work force is now truly mobile. They can view documents wherever they may be."

"Cost savings are on-going," explains John, "there is ultimately an end to paper archive and retrieval which ensures that storage costs are capped."

"There is an increase in efficiency across the board," he adds. "For example, when handing over management, should a client sell a property, all that is required now, is a few minutes on the PC and you have a complete set of documentation on a CD. This has never been so simple and so comprehensive. A good handover is vital for clients."

The story doesn't end with installation, however. John continues to have ideas and finds that the guys at Softology are prepared to listen and adapt the system to meet new requirements.

Consequently, John has revolutionised the process of producing a set of invoice images with each client rent statement. It used to be a tedious photocopying exercise, now replaced with a QUBE report wizard followed by a Softology menu item in Excel.

"This is just one example," says John, "and whatever we ask of Softology invariably becomes a new 'feature' fairly rapidly."

"Frankly," John concludes, "I don't know how you could run any facet of a property management office, or any office, for that matter, without a DM system, and Softology's fully integrated system fits the bill for Lee Baron. If you are a Property Management company using QUBE, then the choice of DM vendor, for me, is obvious."