

Game Changers in Document Management



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1.

Introduction

In the current competitive and challenging landscape, it's clear that organisations need to be agile.

They need a flexible mindset and approach to operations and processes in order to stay ahead of their competitors. HR leaders play a significant role in this – both in people management, systems and processes terms.



2.

Business challenges

Things don't always run smoothly. Growing pains, external pressures, changed circumstances and a whole host of factors can, and do, play into how effective a particular organisation will function.

Organisation size can be a factor. If three people are down in a team of ten it will have a marked impact on operations and the ability to meet objectives. Other internal factors can play a part: cash flow, people dynamics, re-structures, changes in personnel, physical factors (a move or refurbishment), computer down time, broken or damaged equipment and so on. General employee health and wellbeing (and the potential impact on productivity) is another factor and will likely come more under the spotlight as the cost-of-living crisis bites further in 2022.

And then there are the external factors. Economic climate, regional or international conflict, skills shortages, changing customer behaviours, advances and changes in technology and also factors such as Brexit, GDPR legislation and the Covid-19 pandemic. Document management and storage might not be something that businesses think about on a daily basis but the three major gamechangers (Covid-19, Brexit and GDPR) impacting UK and Ireland organisations in the last few years have generated a heightened focus on keeping information secure and readily accessible.

Gone are the days of filing cabinets lining the walls of offices. Demands are increasing with operations, systems and process needs more complex than ever before. Additionally, there are now significantly more stringent rules for keeping information stored safely from the growing threat of cyber-attacks.





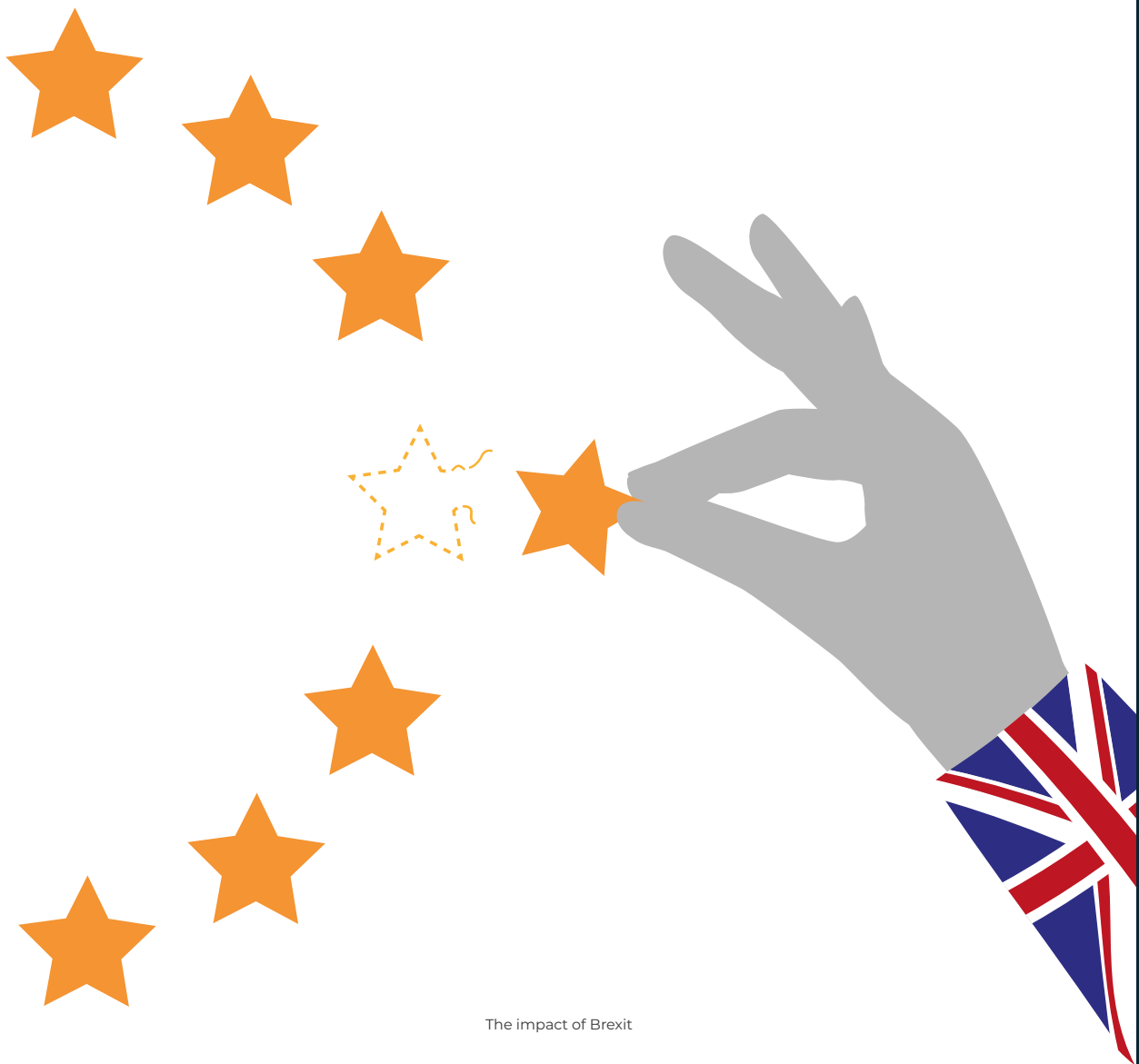
3.

The impact of Brexit

Some believed that leaving the EU would “set Britain free from the shackles” of Brussels-centred bureaucracy. Leaving the EU hasn’t necessarily simplified things.

In many areas, in fact, increased layers of administration, complexity and compliance have been placed on business – particularly for businesses who import and export.

Additionally, there’s more for businesses to consider around right-to-work legislation. Keeping on top of increased paperwork and documentation is now a bigger challenge than ever.



The impact of Brexit



4.

The GDPR factor

Often associated with (or blamed on) Brexit, was the introduction of General Data Protection Regulation (GDPR). This EU-driven piece of legislation became enforceable in 2018 when the UK was still in the EU.

However, Britain leaving the EU didn't signal the end of GDPR – instead, it just became 'UK GDPR' with no major changes to what businesses needed to do to comply with stringent rules and regulations around the storage, retention and deletion of data, documents and information.

Businesses must comply. When retaining personal information and data they must establish (and be able to prove) that they are doing so correctly. There are seven main principles:

- Lawfulness, fairness and transparency
- Purpose limitation
- Accuracy
- Storage limitation
- Accountability
- Data minimisation
- Integrity and confidentiality (ie, security)

The risks of not adhering are significant, with hefty fines of up to £17.5M or 4% of annual turnover hanging over organisations who don't comply. Marriott and British Airways were both hit by multi-million-pound fines not long after GDPR was introduced – both for a lack of IT security around personal data.

In addition to this potentially costly censure is the reputational damage that organisations will suffer as a result of a GDPR breach.

While many people focused on the costs of implementing GDPR, the basis and need for the legislation isn't something you can really argue against. The protections it offers are both important and reasonable. And also, businesses are getting used to GDPR – but they shouldn't be trying to manage even small amounts of data manually – the risks are just too high.



The GDPR factor



5.

The pandemic

The pandemic changed work life forever in early 2020 when millions of people started working from home.

It presented some hitherto rarely experienced challenges for business. There were concerns in many quarters – productivity worries about unsupervised employees, reduced human contact and a lack of interaction. ‘Home office’ conditions and facilities varied dramatically.

Security was another major factor. Millions of people working at home meant challenges for how businesses would manage information, data and documents. The secure disposal of documents had to be managed, but concerns weren’t limited to just physical documents and files. There was online security to be considered. Increasing numbers of people working at home meant increased risk – risks around file sharing, document storage and possible cyber security threats.

Aside from the security concerns there was also the issue of access to documents so employees could simply do what they had to do. They needed access to files, data and documents to do their work. Businesses needed to have rock-solid security processes to avoid exposure. Businesses had to look at document management solutions.

The pandemic also brought people issues and collaboration to the fore with discussions around wellbeing and culture becoming as important as discussions about company performance. Centralised digitisation supports collaborative business processes as there is only one single version of current documents – which are instantly accessible according to a user’s access level.



The pandemic

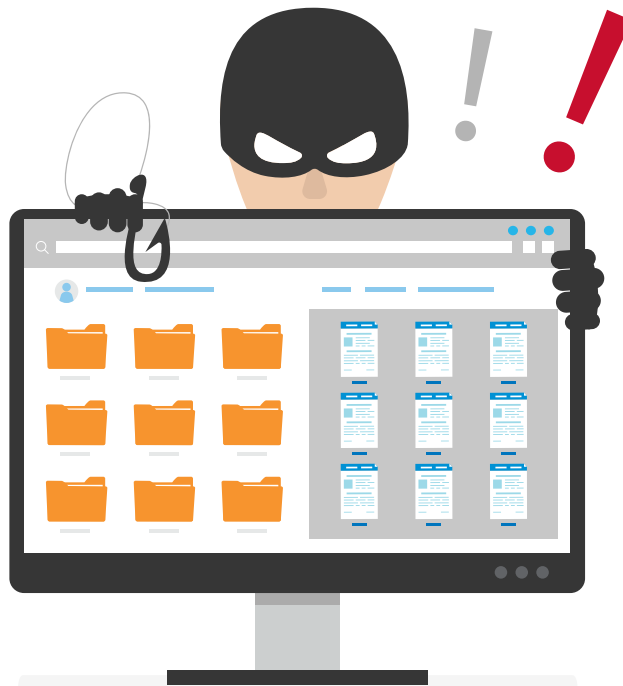


6.

Security first

First and foremost, organisations and businesses need to think about security.

The threat to big businesses, educational institutions and government bodies from cyber-attacks has increased significantly in recent years – and has been further increased by the West's response to Russia's invasion of Ukraine. Ahead of considering reducing workloads and streamlining systems and processes, ensuring documents and data are held securely needs to be the priority for any organisation.



Security first



7.

Reducing the burden

External, and often unexpected, factors such as Brexit, the pandemic or GDPR will, in different ways add to workloads, and impact processes and systems.

This could potentially slow an organisation down, affecting productivity and achieving strategic objectives. The additional administration required will chew up increasing amounts of time.

More sophisticated document storage and management solutions are needed. These solutions need to comply with relevant regulations, but the automation of as many processes as possible reduces the additional administrative burdens Brexit, GDPR or the pandemic have created.





8.

A simple solution to document control

Reliable, secure alternatives to managing personal data manually are critical.

What should organisations be looking for in a data management solution?

Relying on a combination of spreadsheets, Word and Excel files, PDFs and other documents spread across a range of servers, shared and personal drives and desktops is a risk and will quite probably lead to problems around one or more of the following:

- Version control
- Document sharing and retrieval
- Potential cyber-attack
- Data, information and document compliance and security.
- Potential fines for non-compliance

In looking for a reliable document management solution, organisations need to consider several criteria:

- How secure is it?
- How easy will it be to digitise and store legacy documentation?
- What sort of audit trail functionality does it have? Is it time-stamped?
- Is there an auto retention and data purging function?
- When data is deleted, is it deleted securely?
- What kind of search facility does it have?
- What levels of access control does it offer – to ensure only people who need access get access to different areas?
- Will it work in conjunction effectively with our existing IT infrastructure?
- How will it be implemented and integrated with our systems?
- What levels of support will we get?
- Is it accessible to people working remotely?



A simple solution to document control



9.

iTrent Document Manager

Reliable, secure alternatives to managing personal data manually are critical.

iTrent Document Manager not only addresses and manages risks and needs but provides a solid foundation and process on which to build a secure document storage, dissemination, retention and disposal strategy. Other benefits include:

- Improved information flow throughout the business
- Adherence to compliance requirements
- Centralised digital records hub and single source for all documents
- Workflow process automation
- Compatibility across all file types
- Removing business inefficiencies – duplication, accidental archiving etc.
- Reduced administration – freeing up employees for other projects and duties
- Reduced carbon footprint
- Mobile ready and scalable
- Digitisation of documents means freeing up office space, eliminating paper and paper trail, a timesaver and more secure
- Powerful search capabilities
- Managers have more control, working in-office or with dispersed teams
- Digitisation affords managers real-time intelligence on work entering the business, tasks, completions, potential bottlenecks and oversights. Supervisors receive automated alerts when thresholds are reached
- Digital line-of-sight ensures control, can underpin company culture change, and facilitates remote and hybrid working

iTrent Document Manager adheres to compliance requirements, providing peace of mind for host organisations. Key employees will be freed-up to focus on higher level projects and tasks – secure in the knowledge that document management is in safe hands.



iTrent Document Manager



Additional reading:

[Information commissioner's office guide to UK GDPR](#)

[iTrent Document Manager implementation case study at Queen's University Belfast](#)

[iTrent Document Manager implementation case study at Huddersfield University](#)

[How to embed good GDPR governance in records and document management](#)

[Impact of Brexit on British businesses – Positive and negative effects](#)

[iTrent Document Manager implementation case study at Young Epilepsy](#)

[Coronavirus: Economic Impact \(house of commons library\)](#)

[Early insights into the Impacts of the coronavirus pandemic and EU Exit on business](#)

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