



Reducing Risk by Protecting Intellectual Property

A Case Study based on FileHold Consulting Expertise

The Challenge

Information is a company's most precious asset but it can grow out of control and become useless if not organized and managed. FileHold Consulting service offers customers advice on "best practices" in both the IT and the document management domain to keep these assets structured and usable.

A customer of FileHold is the Research Department of a Fortune 100 company that provides market analysis services to other business units within the company. They had growing volumes of research materials created internally and gathered from third parties. The research was stored in 7 unique and completely disconnected repositories including; over 40,000 pages of paper documents, a custom SQL data repository, 4 legacy Lotus Notes databases and an offline Alchemy document management system. The information was located in both US and UK offices.

As a result information was hard to find, difficult to use, often not available to market research personnel and sometimes even appeared to be missing.

This customer engaged FileHold Consultants to;

1. Improve ease-of-use by and decrease the time it takes when searching for and accessing market research materials.
2. Unify the research material into a single secure repository but at the same time make it accessible to employees anywhere in the world through the corporate intranet.
3. Simplify the workflow process of provisioning, conducting, approving and distributing market research projects for their business unit customers.

The FileHold Solution

The FileHold Consultants advised the customer on how to consolidate and classify the 7 disparate repositories into a single secure, searchable repository. Activities included the following:

User access to the Research: It was recommended the repository be on the companies internal corporate intranet making it secure but accessible to employees located anywhere in the world.

Eliminating Paper: The Consultants provided advice and services to convert 40,000 paper documents to electronic form. All documents were OCR'd and saved as PDF image plus text files to make them searchable and readable by a full text search engine,.

Solution Summary

The market research department of a Fortune 100 company consolidates and secures research data previously stored in 7 unique and completely disconnected repositories.

Research information that was previously inaccessible to many users is now made available to all employees worldwide

Project managers realize tremendous time savings when searching for market research information on past and current projects.

All project managers are now able to more efficiently manage their research projects through the forms-based workflow system.

Full Text Search: The rich content of the market research materials was ideally suited for retrieval using full text search technology. All scanned paper and other electronic documents were automatically indexed by the full text search engine before being imported to the new repository.

Document classifying / tagging, / metadata: In the past the separate repositories had developed their own, unique way of classifying documents and adding "tags" to them. To ensure that investment in classifying documents was not lost, the FileHold Consultants mapped metadata from each source system to a single, common classification scheme.

Workflow: FileHold Consultants wanted to streamline the workflow from provisioning to market research results distribution. To do so they created a forms-based workflow solution that mimicked the customer work processes.

IT Practices: The Consultants advised on setting up the system in a third party tier 1 hosting facility that is monitored 24 hours per day 365 days per year. The system has the highest possible degree of system uptime, security and backup / failover support. This organized library contains over 35,000 market research items.

Business Benefits

The customer reported the benefits of the final solution are;

1. All intellectual property owned and managed by the company is now centrally secured and protected.
2. Research information that was previously inaccessible to many users is now made available to all employees worldwide
3. The time it takes to search for and retrieve information relating to an existing or new research project is significantly decreased.
4. All project managers are now able to more efficiently manage their research projects through the forms-based workflow system.

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