



# Collaborative Records Management

DocBanq White Paper

© DocBanq Pty Ltd  
Suite 145 National Innovation Centre,  
Australian Technology Park, Sydney  
NSW, Australia 1430  
Phone +61 2 8252 0857 • Fax +61 2 9475 5068  
[docbanq@docbanq.com](mailto:docbanq@docbanq.com)  
[www.docbanq.com](http://www.docbanq.com)

## Overview

Traditional file management techniques using paper files form the basis of many organisations' record-keeping practices, however paper files are:

- Expensive to manage;
- Out of step with growing numbers of electronic records, such as e-mail;
- Reduce the flexibility to use people and resources to manage cost and performance; and they
- Are difficult to share and work on collaboratively.

Organisations that are routinely required to share selected files with other organisations find paper files inconvenient, difficult to track and expensive. These organisations include providers and consumers of:

- Legal expertise, such as law firms, insurers and banks;
- Outsourced back office functions, such as mail handling, invoice processing and administration, and
- Outsourced compliance audit and review, such as accountants and corporates.

The DocBanq electronic document and records management system (EDRMS) allows organisations that must share records effectively to:

- Seamlessly manage paper and electronic records, including e-mail and faxes;
- Securely access records from any office and any home at any time using the Internet;
- Move to standards compliance (such as ISO15489 or LAW9000), and
- Give managers visibility of file status.

DocBanq provides a powerful solution for collaborative file management that is easy-to-use and cost-effective to implement.

## Revolutionise records creation, distribution and retrieval

The use of paper files leads to tremendous operational inefficiencies in the workflows within and between organisations, especially when professional resources are distributed across offices or at home, or when detailed interaction is required between the customer and service providers.

Using DocBanq, organisations can:

- Instantly distribute, copy and update files for clients, solicitors, barristers, accountants and others while maintaining strict access controls;
- Retrieve relevant files and documents using powerful search tools from millions of entries;
- Monitor the status of files and generate management reports;
- Allow personnel to re-use previous work as the basis for new documents, and
- Give staff access to files at alternative office locations, from home or from the client site.

DocBanq offers a unique opportunity for organisations to control, broker and manage the information and records between organisations that must collaborate:

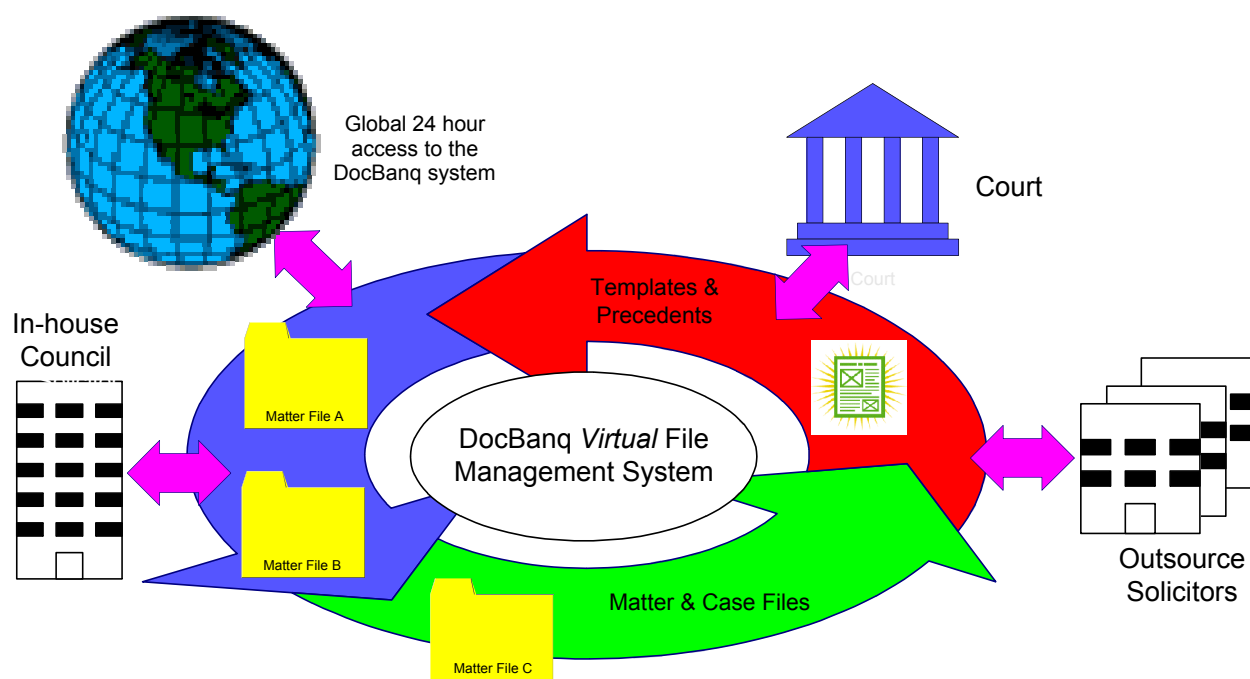
- Capture records directly from the source;
- Share selected records between organisations;
- Determine the status, timeliness and location of files;
- Control file access as required, and
- Allow staff to share, collaborate and search upon files from the office or from home.

## E-mail and other electronic communication

Organisations now routinely use e-mail to communicate important business decisions, however tools to manage these records have historically lagged way behind, before now.

Using DocBanq, organisations can:

- Reduce the storage of matter-related e-mail on personal e-mail accounts inaccessible to others;
- Provide rapid searching of e-mail and other documents;
- Supersede the inefficient practice of placing paper copies of e-mail on file, which then lose the ability to be searched electronically and be re-used;
- Allow compliance to Sarbanes-Oxley record-keeping obligations if required, and
- *Most importantly*, DocBanq allows e-mail to be placed ‘electronically’ directly upon files, thereby allowing the capture of the full spectrum of records in the one ‘place’.



## Information technology - disaster recovery & piloting

DocBanq is a fully managed service with a high level of security, disaster recovery and redundancy, and DocBanq's economies of scale allow us to make this premium infrastructure available at a low cost.

DocBanq also provides a full piloting capability, allowing organisations to comprehensively trial the system prior to any implementation.

## Conclusion

DocBanq is a standards-compliant EDRMS that allows organisations that must collaborate access to a common set of 'virtual' files that are visible and available to all authorised parties at all times via the Internet.

DocBanq allows the seamless management of paper and electronic files according to records management principles and can revolutionise the distribution and management visibility of the collaborative file set.

DocBanq is easy-to-use, cost-effective and provides a high level of security and disaster recovery.

## Contact

DocBanq Pty Ltd  
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[www.docbanq.com](http://www.docbanq.com)