

ELOoffice Customer reference

Oliver Schneider



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Time for the important things

ELOoffice: document management for all the family

"I have been using ELOoffice since version 5.0 almost every day, and I have never regretted it - quite the opposite - the latest version 9.0 actually makes it really enjoyable to work with the software.

I think this is down to the new user interface, based on Microsoft's ribbon technology."

Oliver Schneider, ELOoffice private user

Why does a private user need electronic document management? We are often asked this question and we find our customers are best able to answer it:

Oliver Schneider is a software developer in the packaging and display industry, and came into contact with document management systems (DMS) in the course of his work. Out of interest, he wanted to see whether the benefits of a DMS were just as real in the private sphere as in the professional world. It soon emerged that a DMS is not only useful and fun to use but also saves a lot of time.

The solution

practical added value



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Find documents in seconds

The experiment begins: the first steps

As soon as the software was installed, Oliver Schneider began scanning his documents into the **ELOoffice** archive. It was soon clear that "random" filing is not the best way to start with document management; even an electronic archive needs to be structured, as Mr. Schneider advises: "It is very important to think hard beforehand about creating a tidy folder structure and not just launch into archiving just like that. After a time I found the right folder structure for me, and I also experimented with the scanning profiles to find the best compromise between quality and file size. To start with, of course, this was a lot of work, but it paid off later."

As a family man, Schneider mostly uses the facilities for automated filing, which saves a great deal of time compared to traditional paper filing, as he explains: "I now file my documents electronically very much faster than I used to. The document goes into the scanner and the process begins. I have saved templates in **ELO**, so repetitive documents like travel expense claims can be keyworded very quickly. If it is a document type that I have automated, **ELO** creates the folder structure automatically where necessary, and moves the document from the inbox to the folder."

ELO live in practice: Invoice archiving

ELOoffice provides many automatic features. You can create index forms which eliminate any manual editing of documents. Oliver Schneider gives another example of this:

"For invoices, I have created an index form which handles the standard fields and also things like supplier, customer-number, invoice amount, payment type and the 'warranty to' date. From this information, **ELO** automatically generates a folder and reference structure (e.g. Companies \ M \ MediaMarket \ 2010) and files the document there. I also give invoices an automatic expiry date, so I don't need to filter them out manually later. That saves a whole lot of time."

How 24 Leitz organisers became one

Oliver Schneider has now scanned all his and his family's documents into the **ELO** archive, including salary slips, business letters, medical records, invoices and nursery school documents. "I have only kept originals of very important papers like birth and marriage certificates and car registration documents. So instead of 24 Leitz organisers I now have just one", he says.

"Particularly when you are searching for documents, you see the value of an electronic archive. In ELO I can find any document in 10 to 30 seconds."

Oliver Schneider, **ELOoffice** private user

The solution

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Ready to use right away

User-friendly operation

Oliver Schneider's wife also uses **ELOoffice** effectively: "Of course my wife Sonja is also an active and enthusiastic user. She was able to use **ELO** after a very brief familiarisation period. Most documents are filed automatically, which also ensures that our shared archive works according to the same rules."

ELOoffice to go?

Finally, Oliver Schneider says that he can take **ELOoffice** with him wherever he needs to: "Another practical and convenient reason for choosing **ELO** is that I can create a kind of offline copy of all my documents, with a viewer. Then I can take all my documents with me in a single USB stick when I am travelling. I don't need to explain the advantages of this one feature."

The top ten benefits for Oliver Schneider:

1. *I can find any document in a few seconds*
2. *Full-text and direct searching*
3. *The facility to stamp or comment on the scanned documents*
4. *Automated cross-referencing within folders*
5. *Automated filing of documents in the generated folder structure*
6. *Storing an expiry date, eliminating time-consuming 'tidying up' as with paper filing*
7. *Possibility of attaching meeting notes to documents*
8. *Possibility of forwarding archived documents via e-mail or fax*
9. *Version control of archived documents*
10. *Facility to check documents in and out, with automated double-sided scanning.*