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Taming the Paper Tiger P2

Previously, we addressed getting started with document management including how to choose a scanner, scanning software, and document/media management software. This part provides specific recommendations for handling various media types.

WHICH MEDIA TYPES TO SUPPORT

The conduct of business involves communication in many different forms. Physical documents are the traditional way that we record these communications. Technology has expanded the number of communication channels, as well as provided new mediums for saving the associated information. The term "media" has grown to encompass these methods. One of the most important decisions is to identify the types of communications or media you will retain. Some media types to consider are:

- pictures including marketing-related images, inspections, damage reports, etc.;
- video taken for the same purposes as pictures;
- scanned documents including lease agreements, letters received from residents and owners, bills, and Home Owner Association notifications;
- electronic documents (letters, invoices, reports, faxes, etc.) you create in your property management software or mail-merged letters using products like Microsoft Word to residents and owners;
- e-mail sent to and received from residents and owners;
- text messages; and
- recordings of phone calls captured by your telephone system.

A key factor in this decision is the capability of your media management system. It will not do you much good to capture high volumes of media if you do not have a simple way to organize, catalog and retrieve them. Scores of documents dumped onto a computer without organization is the electronic equivalent of piles of paper stacked on desks and in boxes.

Assuming you have a capable media management system, let's discuss each of the media types in more detail.

PICTURES

Manufacturers keep increasing the capabilities of digital cameras at a rapid pace. Most digital cameras available today are capable of creating images in the five to ten megapixel range. The current standard for images is JPG (Joint Photographic Experts Group), a compressed format. A typical picture taken with these cameras is more than one megabyte in size, which will print a quality 8" x 10" picture. High resolution images taken by these cameras are overkill for their typical use in property management. The large size of the images causes difficulties including:

- longer time spent transferring the images from the camera to your computer;
- more disk space to store the images (typically ten times more than you need) leading to increased backup times and sizes; and
- slow retrieval/display on networks and particularly over the web.

Fortunately, there are relatively simple solutions. When taking pictures for your property management business, reduce the resolution to around 600 x 800 dpi or one megapixel which will print a quality 3" x 5" picture. These settings correspond to a compressed file size of about 140K, a tremendous savings over the average default 2MB picture size. Experiment with resolutions to get the right balance of quality and size.

Another approach is to resize each picture after moving it to your computer. Images are resized and linked automatically by our property management software (PMS) package to their parent lease, owner, prospect, etc. We found that with multiple users contributing images and the large volume of historical images people own, this method provided the best performance result.

If your PMS does not provide this feature, there are stand alone graphics packages that can either individually or mass resize the pictures for you. For example, Serif's PhotoPlus (www.serif.com) supports the mass resizing of images in a directory.

VIDEO

Many digital cameras also support video capture. Numerous inexpensive dedicated video cameras are available. Camera settings are much more important for capturing video than for images because the file sizes are much larger and the software for manipulating video images is not for the faint of heart. If you plan to use video over the web, these settings are recommended to optimize transfer and display times:

- Format: FLV, WMV, MOV
- Size: 384x288
- Length: Most people will not watch a marketing video longer than one or two minutes.
- Sound: 16 to 22kHz sampling rate

Only a few programs currently available support the FLV (Flash Video) format; however, this will provide the smoothest video at the lowest file size. The next best format for compatibility is WMV (Windows Media Video). Even at the recommended capture settings, a one minute video file in FLV format will be more than 1MB in size and about 2MB in the WMV format.

SCANNED DOCUMENTS

The largest media source will likely be scanned documents. The hardware side of scanning documents including scanners and scanning software was reviewed in the November issue of the *Residential Resource*. We recommend you use multi-page PDF (Adobe's Portable Document Format) documents scanned at 150 dpi. This resolution provides good quality and limits the resulting file size. While other formats like TIF and Microsoft's XPS formats are attractive, the PDF format has become a universal standard that is easy to use and view.

ELECTRONIC DOCUMENTS

Many of the documents you produce on a daily basis originate in your PMS such as:

- lease related documents including lease agreements, certifications, lead notifications, etc.
- mail-merged letters like late notices, lease renewals, violation notifications, etc.
- monthly statements to residents and owners
- monthly closing reports including rent rolls, owner balance reports, delinquency reports, resident balance reports, etc.

Unfortunately, most software packages are unable to simultaneously create electronic documents while printing a copy. For example, to save resident and owner statements electronically and also print a copy in our PMS, we had to automate the generation of statements individually and then print each one separately.

If your system does not support this capability, you will need to print each statement individually to the PDF printer to get an electronic copy and then manually print the PDF document. The same PDF printer can be used from Word or Excel to save electronic copies of merged documents. You will also face the same problem with creating separate electronic documents when doing a mail-merge for multiple leases. If your PMS and accounting system do not include a PDF printer, you can install one. We have found that a free PDF printer called Bullzip has worked well. You can obtain a copy from www.bullzip.com.

E-MAIL

An often overlooked aspect of document management is capturing e-mail messages which often contain critical conversation and agreement-related notifications. Quickly accessing these e-mails can be invaluable when trying to resolve a dispute with a vendor, resident, or owner.

Most e-mail data is dispersed on separate machines over various e-mail addresses and is not readily accessible or shareable. These separate islands of information make the process of gathering and cataloging e-mails much more difficult. We are developing an e-mail cataloger that scans both your inbox and outbox e-mail accounts and automatically matches them.

Without an automated tool, you must manually link each received and sent e-mail in your media management software.


TEXT MESSAGES

Text messaging is becoming an increasingly popular method of communication. The challenges of this media are similar to the e-mail discussion above.

RECORDINGS OF PHONE CALLS

Many telephone systems have add-on abilities to record phone conversations. Asterisk, a popular Linux-based VOIP (Voice Over IP) system, has this as a standard capability. Each phone call is identified with a CID (Caller Identification). An automated system matches the CID to the phone numbers in your PMS and links the calls to the correct entity. Even if you do not record all conversations, the call logs, when linked with the calling entity in your PMS, provide you with backup for those occasionally difficult conversations where residents/owners have amnesia.

NEXT MONTH'S DISCUSSION

Look forward to a review of media infrastructure issues including how to archive data, backup options, and access to documents over the web. 

Serif's PhotoPlus (www.serif.com) supports the mass resizing of images in a directory.

Obtain a copy of Bullzip, a free PDF printer from www.bullzip.com.