



Adding Workflows to Document Management: A Step-by-Step Guide

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Now that you have your document management system up and running, you'll want to utilize all the features that come with it to make sure you get the best return on investment possible. Different systems have different ways to optimize your processes, but workflows are what can take your document management to the next level. Workflow automation is used to heighten your productivity by standardizing and automating manual, often time-consuming, steps in your process; allowing you to apply custom rules and logic to your document process flow.

With Optix's workflow automation you can build workflows to automatically distribute work across your teams, extend workflows to other systems, make custom processes through program extensions at both the desktop and server, and [the list goes on!](#) We are here to help you optimize your business processes outside of just having a document management system.

As you work toward [upgrading your document management system](#), you need to also make sure you utilize all the features that come along with it! In this blog, we will take you step-by-step through implementing workflows into your document management system.

Step 1: Determine Your Objective

The key to an efficient workflow is to determine your objective: What challenge do you want to solve with a workflow? Workflows can be used to accomplish a multitude of tasks, so a great place to start is framing your challenge through the lens of your business process so you know where to get started. For example, you might notice that invoices aren't getting to each necessary department on time for approval. Your objective for this may be to streamline the specific documents needed for invoices through workflows. You see a challenge or issue within your business process and you create a solution through these workflows.

As you begin to review your business processes you may recognize that multiple workflows are needed to accomplish your objective(s). One workflow may be dedicated to streamlining invoices through various departments within your business, while another may be used to ensure important documents get signed and received by the correct people. For workflows to be efficient, they should function in a way that is consistent with your organization's business processes to avoid unnecessary complexity. For instance, if you need an agreement authorized by your sales manager before it goes to finance, it wouldn't make sense to send it to finance immediately after it is created,

causing it to be sent back to the sales manager, then back to finance again — workflows can cut down this unnecessary complexity.

As you determine your objectives and begin building out workflows, be sure to explore the unique features your document management system has to offer. With Optix automated workflows you'll find features such as "delegation" with the ability to assign specific documents to one or many colleagues. Additionally, you can create tasks and deadlines for team members as well, ensuring that a required document makes it from point A to point B without having to manually remember to follow up. Optix also provides a "check-in/check-out" feature allowing your team to manage certain documents by "checking out" a document while working on them, then check them back in when done. This prevents two people from working on a document simultaneously and canceling each other's work. Whatever your objective, Optix's [automated workflow features](#) are built to be configurable to the requirements of our customer's business processes.

Step 2: Gather Necessary Requirements and Information

Now that you have set objectives for your workflows, you can start gathering the corresponding information needed to run them. Consider what documents can be integrated within your workflow, who will be managing and interacting with these documents, and where these workflows will be implemented within your business process. Minding these considerations will help plot a course for your information distribution. As you gather your desired documents, think about how the workflows will affect individuals, groups or different departments within your business.

Step 3: Compile Baseline Metrics

Before you go live make sure to measure your current process by including relevant metrics to establish a baseline. Ask yourself questions such as: “How long does it currently take for a document to reach the end of this business process?” “How many documents need to be processed within this business process?”

The reason for gathering baseline information is to help your business see the success and progress of your workflows. It allows you to see the missed opportunities you may have. If you don't gather baseline information you won't be able to measure how you've optimized your processes as time goes on. You may see from your baseline information that your one workflow made your invoice process two times faster and now you want to try it with another document type. Having this information shows you how successful your workflows are and where improvements can be made. Workflows are a live piece of your business that can be constantly monitored and optimized as your business grows.

Step 4: Test it Out and Go Live!

With the objective and information you have put together, your workflows are ready to be built out in your system and pushed live! These workflows are an efficient and configurable way to optimize your business processes. Make sure you test out the workflows through all possible sequences to ensure the workflow is meeting expectations. Once the workflows are live, make sure to keep an eye out for any issues that may arise. Take your baseline data to measure against your workflows progress and make adjustments as you see fit.

Workflows are what set your document management system up for success. Utilizing workflow features can benefit your business processes by helping organize and streamline the movement of your documents throughout your business. Here at Mindwrap, we are here

to help your business by providing the support, tools, and robust technology you need to utilize your document management system to its fullest potential.

Questions on the process? [Contact us](#) today and we'd be happy to discuss what a transition looks like for many of our past clients. See in real-time how small businesses can transform their document management with Optix.