



# Document Management: Customized Tools Allow For Rapid Implementation

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Most businesses hunting for new document management software are presented with many off-the-shelf systems that boast quick and easy implementation. And sure, while setting up already-programmed document management software can be easy, getting it to work for your business is a totally different story.

One of the biggest headaches we hear in the industry is how the document management software one of our clients previously purchased did absolutely nothing for them. It started up relatively

quickly and gave them the tools the description said it would, but getting the tools to work for their specific work and document processes was a nightmare. This happens more frequently than you'd think—many off-the-shelf software solutions provide the majority of the tools you need, but no training or customization features that your business needs to utilize document management to its full potential.

The confusion surrounding easily-implemented document management solutions can come from the word “customization” itself. Many hear customization and think complex, costly, and a time sink. In reality, a customized document management solution has none of these problems—it actually allows for a more rapid implementation process because its features are built specifically for the business's needs.

In order to understand how a customized document management system is more easily implemented and used than an off-the-shelf system, we're going to detail a few of the features Optix provides our clients and how these features can transform work and document processes quickly and without requiring complex coding knowledge.

## Drag-and-Drop Application Generator

While there are many similar departments in each business (think HR, Accounting, etc.), not every business runs these departments the same exact way. This can be a huge roadblock when it comes to implementing your new document management system. If the screen or document building feature doesn't have the right fields or doesn't allow you to create them, you're stuck conforming your business processes to your system's requirements—that sounds backwards to us!

The Optix Drag-and-Drop Application Generator was built to give every document management process owner control over their own document indexing and query screens. No coding background is

needed, and in just a few minutes you can have exactly the fields you need, ready to be uploaded into the Optix server and used by your team. The Drag-and-Drop Application Generator is a huge part of how a customized document management system can be implemented quickly and efficiently. Check out [this blog](#) to learn more about this specific Optix feature.

## Full Implementation and Training Support

With an off-the-shelf solution, all you're given is the software. There's probably a number to call or an email to contact when an issue arises, but many times—that doesn't cut it. With Optix, you're never alone in the implementation process. One of the [many myths surrounding document management](#) is that switching from paper to digital is time consuming and too complicated to be profitable, and this simply isn't true with our team of experts to help you.

Two of the most important pieces our Optix team provides is implementation support and ongoing training. When you're taking your office full of paper to a digital system, you need an experienced team to help you design and implement the process to scan and index all of your important documents and files correctly and in a timely manner. As well, ongoing training is crucial to help your document process owner and entire team utilize the software efficiently so that you're getting the most bang for your buck. The Optix team of experts is available for each and every issue that may arise, and is always just a quick and direct phone call away.

## Customized Indexing with Full-Text Capabilities

Indexing refers to the organization of your documents and digital files in your document management system. This allows for quick and easy

retrieval and storage. With Optix, your support team can help you design and create the perfect indexing strategy that conforms to your business processes and needs. A good indexing design will allow you to search and find the exact document you need in seconds rather than the inefficient method of going into a folder labelled “HR” and scrolling through document names to find what you’re looking for. The normal desktop file-folder methods quickly break down as you have to manage thousands or millions of documents.

An alternative method to creating an index record for each document is to index by the document contents. This optional Optix feature allows you to find documents using words and phrases that might appear in the document.. For example, if you’re looking for a specific product and how often your business receives it, you can search that product code and pull up each and every delivery document to quickly build any type of report. You could also search a customer code and find any documents related to that customer, no matter where the customer code is within the document. This is another key feature of the customized screens and documents Optix gives you the power to build, slashing hours of manual administrative work out of your day.

## Getting Started

Investing in a fully customizable document management system is an investment in your business’s future success. As the world rapidly speeds toward becoming remote and more digital, removing the inaccuracies and inefficiencies of paper document management is a must.

Don’t let the word customization fool you—without the tools to help conform the system to work *for* you, an off-the-shelf document management system could actually work against you and make things more difficult to manage.[Contact one of our experienced document management experts today](#) to learn more about Optix, a fully

customizable and rapidly implemented document management system that can work for any business in any industry.