



How to Choose the Right Document Management System

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When your desk becomes cluttered, documents go missing, and productivity starts to suffer, you know it's time to look into a document management system—but where do you begin? It can seem a bit daunting when you start the process, but one of the biggest tips we can give you is simple: The right vendor makes all the difference.

You shouldn't go through the document management journey alone. With the right vendor, you can easily migrate all of your necessary data, documents, and important information seamlessly into your new system while being guided by the vendor who built it. A good document management system doesn't just save your information—it saves it in a way that's easily searchable and accessible (usually on multiple devices) for any member of your team that needs to see it.

Let's get to the important stuff: How do you find that perfect vendor? With the right questions, you can weed out the lackluster vendors who cut corners and skimp on customer service. Here are the top eight questions you need to ask when searching for the right document management system vendor.

1. Are Documents Stored on Premises or in the Cloud?

It's crucial that you know where your documents are going when you migrate to a document management system. For example, certain industries have compliance regulations that forbid you from storing data in the cloud to protect customer privacy. Make sure you talk to your vendor about where your documents are being stored and how important the safety of your client's information is.

2. Can I Load Both Electronic and Paper Documents?

This one can get messy. Being able to load paper documents is crucial to the speed of your migration process, especially if you've been using paper for decades! That would be a lot of information you'd have to digitally transcribe before you could load it. Check to make sure that your vendor lets you scan in paper documents directly

into their document management system to save you time during migration.

3. What Are the Reader Permissions?

Depending on your needs, you may need to allow outside readers (clients or customers) access to your documents. Make sure the document management system you purchase allows this and that the vendor can explain exactly what the permissions are. If they only have a set number of people who can access the system, be sure that fits your needs; otherwise, you may find yourself short when your employees are trying to sign in.

4. How Does the System Track Past Versions?

Is there a way to keep track of all your documents, even previous versions? You never know when you may need to go back into your history and see what was previously written before a document was changed. You want to be sure that your document management vendor has qualifications for this and doesn't erase past documents without your permission.

5. Does the System Help Keep Me Compliant?

Compliance is nothing to brush over. Companies across many industries can get hit with heavy fines or even be put out of business if they breach compliance regulations. Be sure that the document management vendor you choose has experience in your industry and is well versed in the compliance requirements you have to follow. Bonus points for vendors who have alerts when compliance needs are not being met and who help you stay on top of all requirements.

6. How Easy and Accessible Is the Search Feature?

For your bustling business, you have no time to be scrolling through folders and manually searching for the right document. Your document management system needs to have an extensive search feature that can perform full searches quickly and with customized fields. If you need to search by date, tag, name, type, or all of the above, be sure the vendor you choose gives you those options.

7. What Type of Integration and Interface Is Offered?

Can the system integrate easily into my existing applications? How functional and user friendly is the interface? If a document management system can easily integrate into your current applications, you'll find that collaboration is a breeze. You also want this system to run smoothly, and your vendor should have it set up so that you don't have to think hard to make it work. Extra tip: Make sure that the security permissions are easy to use so that your team isn't constantly contacting the vendor support for issues that should be easily settled on premises.

8. What Are the Training and Support Like?

Having the right support and training is crucial to your success with a document management system. No matter how great the system is, someone is bound to have questions, and bugs may arise. You want to know where the support is (e.g., U.S. based or not) and whether that fits within your compliance needs and their hours. With training, how much help are you going to get with migrating to their platform? How much help will you need, and how supportive are their

employees in ensuring your success? Without the proper support, you can feel like you've been left in the dust.

Getting Started

Now that you've got something to get your document management system search started, where do you go next? You simply need to hunker down and do the research. Before you sign on any dotted lines, get the answers that you need to know you're going to have the right system for your business: one that will help you be more productive, work efficiently, and exceed client expectations.

Want to throw some of those questions our way? [Contact us](#) to learn more about Optix, a document management and workflow solution that will improve your day-to-day processes and give you the tools to perform at your best.