



How to Maintain Document Processes While Working Remotely

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When much of the professional world began working from home this past year, it was evident that many business operations and processes developed for the office simply wouldn't work as employees went remote. While some businesses are already going back into the office, many have chosen to keep working remotely. It's not uncommon for companies to decide to nix their office space entirely citing that some *prefer* working remotely. For employees, it seems overwhelming— taking your belongings and working in your home which may not necessarily be optimized for productivity. There is the

concern of not having access to physical files or important notes, not to mention a risk of losing or misplacing these files indefinitely. While concern around these challenges is valid, it certainly doesn't have to be a barrier to successful remote work. Thankfully there are ways to maintain and optimize your organizational document processes to make sharing documents and SOPs simple and seamless.

Here at Mindwrap, we want to help identify the most effective ways of maintaining document processes while working remotely. Document management systems are critical to successfully maintaining processes while working remotely — and implementation is much easier than you think. At Mindwrap we make the process as [quick and straightforward as possible](#).

Whether in the office or at home, how your team manages and maintains records and processes is critical to successful remote work. In this blog, we will help guide you through the best practices to help you face your organization's challenges and make working from home a little easier.

Going Paperless

Paper files are a pain to begin with, but trying to manage them while working from home? *Forget about it.* The time and energy wasted chasing down documents can be killing your team's productivity. Going paperless can significantly streamline your document management process, and give your team back valuable hours.

Document Scanning

Document scanning, also known as document imaging, allows paper files to be converted into a digital image format. This digitization is a great way to create and maintain long-term, archival storage of your documents. With so much uncertainty about when, and if, teams will return to the office, starting with this step will secure all your

documents in one place—eliminating the need for physically stored files in the office.

Optix provides [multiple features](#) within our document scanning system that make going paperless much more accessible and customizable. These features, such as a standardized interface, easy one-click scanner settings, document capture tasks, and more, will allow you to organize your documents in one place and access them from anywhere—even at home.

Document Management

Storing documents safely and efficiently is important, but what about retrieval? It's equally important to have a streamlined and efficient way to retrieve documents when they're needed. While working from home, making copies and filing in multiple physical locations is simply not possible for the remote workforce. Document management allows for the quick capture and tracking of a document across an organization, taking away the complications and impracticality of managing multiple paper copies.

Going paperless can help bring organization and accessibility to the information teams need most.. With a sound document management system, transforming paper files, audio files, videos, electronic artifacts, and creative file formats to digital becomes second nature. Going paperless will undoubtedly optimize the transfer of information throughout the adopting organization.

Maintain Communication

Communication is vital when it comes to the success of remote teams. Communication can quickly become disorganized, inefficient, and frustrating when working from home. Although we have video chats and voice calls, working remotely means there is no walking across the office to make sure someone reviews or approves a document. To

optimize communication while working remotely proper document management and workflow automation are non-negotiable.

Workflow automation takes the document management process to the next level. With a well-designed document management system, workflows allow the application of your business rules and logic to ensure an organized communication flow for important documents. While working remotely, workflows streamline communication easily no matter a team's location.

Approvals, reviews, and transfer of documents between teams are simple with proper document management. Automated workflows are the best way to implement a digital structure within your business that's easy to maintain remotely. Instead of physically presenting that new invoice to the manager, a workflow automation will do this same work by sending the invoice to the manager automatically once completed. The key to an efficient workflow is customization, the process should flow in a way that is consistent with an organization's unique business requirements. Often, that requires a more configurable document management system. Take Optix as an example—built specifically to be out-of-the-box, but easily configurable to cater to the document management and workflow solutions needed by those that use it.

Optix workflow features include the Drag and Drop Application Generator, allowing process editors to automate repeatable business processes in minutes, not hours — and no coding background is needed. Optix will ensure that the document lifecycle is both maintained and adhered to through specific automations and robust programming.

Optimize Your Process

Going paperless, organizing, and automating workflows, ensuring your strategies are efficient and most significant is the final step in maintaining your document processes while working remotely.

To optimize your process while working remotely, you have to consider all the different challenges that come along with being out of the office. Computer crashes, internet issues, kids at home — the list goes on. By optimizing your processes with a document management system, you can ensure that the communication between document users stays streamlined and your organization as a whole is optimized for remote work, one less thing to worry about.

Working remotely can be a challenge — not everyone is prepared to switch their spare room to a productive office space. That said, with reliable document management systems and optimized business processes, you can make sure your business is moving forward and ready for this evolution of how we work.

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.