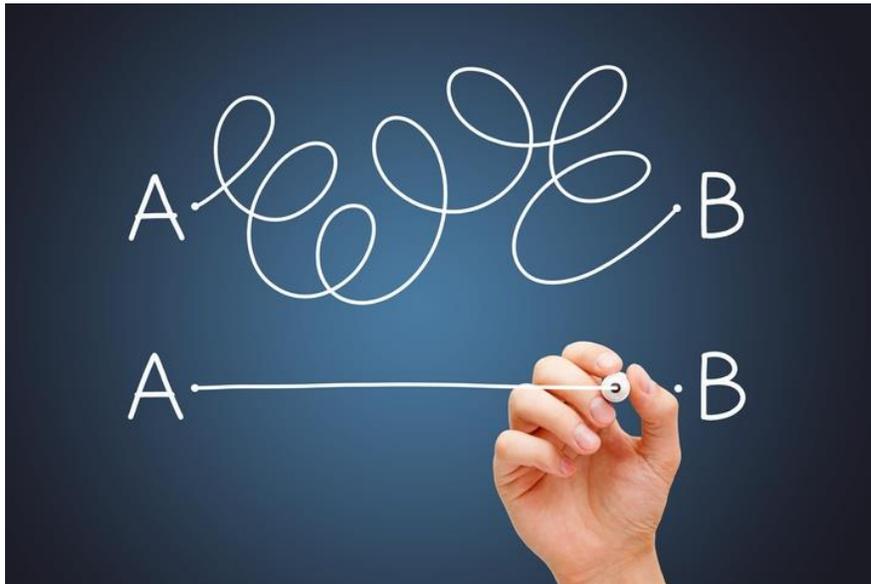




Simplifying Your Document Management Software Implementation

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Preparing your migration from paper to digital can seem daunting, but it's much less of a hassle than you think. Implementing a new document management system is not a task you should handle on your own. Even with a well-versed IT team and some extra time on your hands, each system is unique and requires extensive knowledge of how it works to make sure you're getting the most out of your new software.

Some document management systems boast a one-size-fits-all, simple implementation. An easy implementation is certainly tempting, but you're going to be sacrificing capabilities and personalization. We've put together this article to help you feel confident in purchasing more robust document management software, and to review how its implementation is much less complicated than you think.

Find the Right Partner

The most important thing you can do is to find the right company to work with—one that has not only the document management system you're looking for but also the support and knowledge to support you in its installation and maintenance.

An out-of-the-box system may be tempting, but that's really all you get—the system. Most of the time, you aren't supported much by the creators of the software and are tasked with implementing and training your employees on how to use it yourself. Even the best IT teams don't have enough time on their hands to do all of this without the support of the software's developers and support team.

With Optix, you also receive our Professional Services team that helps implement, train, and maintain your system to work exactly as you need it to and make sure you're getting the most out of its capabilities. We've worked hard to create a robust document management system that provides all the features you need but doesn't require a total overhaul of your technological understanding. Our experts know how to customize indexing and query screens and features to give your team a look and feel that is familiar but still transforms your day-to-day processes.

Build the Right Document Management Strategy

This is another critical step in the process that requires you to partner with the right vendor. Document management isn't just about uploading documents and keeping them on a hard drive somewhere: It's about implementing a digital document strategy that simplifies the process of finding documents, creating them, capturing them, and securely sharing them across your organization. To make sure you're starting this new implementation off on the right foot, a good vendor will ask many questions about your current process to help build a new one that is familiar and easy to understand, but much more efficient.

Here are some sample questions your vendor may ask you during this process:

- What is this document, and who needs to see it? How is it being used?
- How do you currently find documents?
- Do your documents go through a re-assessment process over time, for updates?
- Does this document have an approval process?
- Are there documents that relate to each other?
- What is the lifecycle of this document, if it has one?

These questions help your vendor build the right pathways and workflows within your document management system to keep your business-specific processes working in a familiar fashion, but in a way that's more efficient and productive.

Beginning the Implementation

Once your vendor has established a baseline of your document processes, they can begin developing and implementing your document management system. A good vendor will not just implement your system in a way that keeps your current processes in place—they'll do so in a way that enhances your efficiency and productivity. There may be some rules or procedures that have been in place for a long time and that have become routine for your business, but a document management vendor can see which of these procedures is now unnecessary or being done improperly and could be causing a loss of productivity.

This is where the magic really happens—our team at Optix does a great job of understanding your processes, finding where improvements can be made, and building your document management system to exponentially improve productivity and lower unnecessary labor costs. Once your system is implemented, training begins to help your team use the system productively. Our experts at Optix are always on hand to answer questions, and if you select us as your vendor, you'll get to know us personally and be able to have a point of contact that you know can answer questions for you based on your specific business.

Getting Started

The main goal of a new document management system is to enhance your document processes, which saves you time, effort, and lowers costs. However, it's important to remember that the technology should not be a burden to your office, physically or financially. The right vendor will work with you to make sure that you're not using a technology that doesn't fit with your business or processes and that the price fits your budget as well. If you're looking to implement a new document management system into your business, [contact one of our experts today](#) to learn more about Optix. Our system's robust features

are easily customizable and tailored uniquely to your business, no matter what industry you're in. If you'd like to request a demo of Optix first, fill out [this form](#) to get started.