



Step-by-Step Guide to a Document Management Transition

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One of the biggest, if not *the* biggest, concern we hear about transitioning from paper to digital document management is the transition process itself. The concept of taking the extensive document history of your entire company from filing cabinets to digital storage is daunting — there's no denying that! Remember the last time you

packed up your home for a new move? It seemed overwhelming, but you knew that the moment your family was settled into that new home would be one you'd never forget. Like many challenges in our lives, a document management transition is one you can be certain will be worth the work.

At Mindwrap, our goal isn't just to provide you with a new system, we want to provide you with the blueprint for success you need to feel ready to take on the transition with confidence. We are experts on this topic and feel that it is important to encompass all the aspects of a document management transition into one blog for easy reference. With the use of our information archive, this blog will provide you a single source of knowledge on document management transitions and will lead you to more detailed blogs for each step involved.

[Contrary to what you might believe](#), there are not tons of complex steps involved with a document management transition. With that being said, there are still some very important things to consider before and during the transition to make sure your transition is a success. We're going to break down the transition into two main phases: Planning and Design.

Planning the Transition

In this blog, we're going to assume you've covered the important step of finding the right document management system. If you haven't done that yet, we recommend hopping over to [this blog](#) first — it's a step you don't want to rush! Now that we're on the same page, let's get started.

Build a Document Management Strategy

Every document management transition needs a plan, and the plan begins with strategy. It's important to consider why you're making this transition. What are the pain points that led your team to make this transition? You want to be sure there are steps in place to manage

these issues and ensure your system functions exactly as you need it to. [In this blog](#), we discuss some specific questions to ask yourself and your document management vendor that can help you build a solid document management strategy to begin your transition.

Find and Organize Your Files

Once your strategy is set in place, it's time to begin compiling all of your files. While you may currently have a consolidated file cabinet or office for your files, you want to be sure all is in order before you begin the scanning process. It's not uncommon for a business to have 99% of their documents in one place, and forget about the 1% that was held in an individual's office or an out-of-sight cabinet that rarely gets used. This is the time to go digging — you need every document that is important to your business processes for the transition. While you can scan documents in at any time, It is critical to have all document types accounted for before you begin the design phase.

Designing the Transition

To start the design process, you'll want to refer back to your document management strategy. There are a few questions you've already answered there that are crucial to designing your new system.

With Optix, your indexing will be built into Optix Screens (which are built using the [Optix Drag-and-Drop Application](#)). You'll need to have your indexing set up prior to scanning in order to scan directly to the appropriate screen. This is why both the strategy and design aspects of the transition are so critical — without them you'd be blindly scanning documents to pile on top of one another in your system with no way to tell them all apart. In short, it'd be chaos! It's also important to plan for how you will handle duplicates and other hiccups you might have during the scanning process.

Depending on the document management system you choose, you might run into certain restrictions with your indexing. But if we use

Optix as an example, the world is your oyster. The key to creating an indexing structure that works for you is, again, building upon the strategy you've established. This way, you can be sure that you'll always be able to find what you need, when you need it. However, in the example of Optix, the full-text search feature can be put to good use, should you ever have trouble finding what you need. This feature allows you to find documents based on order numbers, employee name, product type, and more, even if they're within the document itself and not the title.

Getting Started

Not too overwhelming, right? Locating all of your documents may prove to be the toughest part. As long as you have a well-thought-out strategy and designed your indexing requirements, scanning your documents into your new document management system will be a breeze.

As always, choosing a trustworthy and reliable document management vendor is a crucial step in the process. Here at Optix, we provide you with the support, tools, and robust technology you need to utilize your document management system to its full 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.