



Top 5 Must-Have Features of a Good Document Management System

October 6, 2021



Documents are not going away anytime soon - we all know that. Whether they are digital or paper documents at one point, your company will need a system that can house these documents properly

and has the features your company needs to incorporate into your current document management process.

There are several document management systems on the market, but what is the right one for your company? Of course, each company is different and will have unique needs, but there are five must-have features that all companies will need in order to implement a sound document management system.

What is a Document Management System?

Before we move on, let's go over some of the basics of a document management system. A document management system (DMS) stores digital documents for retrieving, sharing, tracking, revising, and distributing documents and the information they contain. It allows companies to take their current documents and have them in a centralized location with easy access for employees. Choosing the right document management system for your company is vital. After all, it can mean the difference between a well-managed process where all employees can find what they need or a backed-up process where productivity grinds to a halt because employees are wasting time searching for what they need.

Top 5 Features

1. Cross-Platform Functions and Integrations

Any document management system is only as good as the tools it provides to integrate with your existing computing environment. You don't want a system that doesn't allow for communication between

other legacy systems you already have within your processes. If you need to integrate an existing client application into a workflow within your DMS, you should have that capability. Without any integration functionality, employees are forced to jump from one application to another, leading to human error and decreased efficiency. Be sure to look at all integration possibilities when choosing your DMS, especially if you have any special requirements for specific applications you are already using.

Cross-device functionality is also essential when looking for a good DMS for your company. There is no reason that your DMS should be limited to one device with today's modern technology. Your team should be able to retrieve documents, whether it be on a desktop, tablet, phone, etc.

2. Security

Security is one of the main reasons many companies implement a DMS. Usually, when storing documents, especially if they are highly confidential, companies want to ensure that they won't get into the wrong hands. This isn't just for making sure people outside your company don't get access to your documents but also people within your company. Not every person within your company will need to have access to every single document. Some employees may not be allowed access due to specific regulations. Security is not something you want to take lightly when it comes to your document management system, so be sure while looking that the DMS has a high level of document security and role-based access.

3. Ease of Use

Once implemented, a good DMS should have an easy-to-use interface so that your employees can learn and adapt to the software quickly and efficiently. You don't want a DMS that will receive pushback from your employees because it is way too complicated to use.

Another factor to consider is the training and support provided by the company implementing this DMS. For example, let's say the interface is easy to use. Still, without proper training and documentation on how to use it, your employees may miss key features or capabilities that could save time and money.

4. Workflow Automation

If you search "Top 5 features in a Document Management System," automation will more than likely be in every single one of those lists. It is, in our opinion, one of the most beneficial features that a DMS can have. Automated workflows can eliminate time-consuming manual processes, dramatically increasing efficiency and productivity. For example, you may have a tiered approval process for specific documents. With a DMS, you would be able to apply custom rules and logic to ensure that certain actions are taken, or conditions are met before a document can proceed to the next step in your approval process. In addition, without any workflow automation features, you may not have any way to quickly move your documents from one stage to another, making more manual work for your employees.

5. Search Features

A DMS can hold millions of documents. Some of these documents are rarely accessed while others are needed in day-to-day operations within your company. Either way, you want to find a document quickly and efficiently when you need to find it, using search terms tailored to

the document type (email, Word, spreadsheet, PDF, or any other application output). That way, your team isn't spending hours trying to find a specific document. There are multiple ways to [index your documents](#) for them to be searchable. What you want is a flexible DMS that allows you to specify the search parameters you need.

How do I Get Started?

Now that you know the five main features that every DMS should have, you need to hunker down and search for a DMS that fits your needs. If you don't already have a document management process or are unsure if your current process is cutting it, check out our other blog on [upgrading your document management](#). As we said before, there are lots of document management systems out there, so be sure to ask any questions and go with a company you can trust. Here at [Mindwrap](#), we can help you start your journey by answering any questions about document management systems and their features.