What is Mobile Document Management With Optix and How it Can Benefit Your Business

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A document management system provides you with all of the software and hardware required to ensure that you maintain control over all your documents. At Mindwrap, we have been implementing our document management system (DMS), Optix, since 1988. Through these years, we have seen the need for and increase of features within a DMS first hand. As technology advances, so do the capabilities of a DMS. Features such as document capture, integration capacities, and more are essential within a successful DMS.

Organizations today are also quickly evolving with the advancement of technology. Especially as we see more employees working from home, there is an increased need to access important work documents from wherever you may be; this is where mobile document management comes into play.

Mobile document management is a way to access and upload documents to your DMS without a desktop. Not all DMS have this capability since there usually isn't a high demand. However, with the technology landscape of the world changing and much more happening remotely, we're seeing the need increase for many companies and organizations.

Here at Optix, most users we see sit behind a desk at work to scan paper, store electronic docs, retrieve them, pass them along on a workflow, etc. - all using desktop/laptop Macs or PCs. However, there are use cases where mobile document management is a need for our clients, and Optix has the capability to support this. Throughout this blog, we will talk about the Optix mobile document management feature, OptixWeb, how it works, and how it can benefit your business.

OptixWeb

Although mobile document management isn't the most common feature we see clients needing within a DMS, we understand it is important. Our OptixWeb software allows users to search for, retrieve, and display scanned documents or electronic documents that are displayable in a browser, all from a mobile device. It fuses document management, workflow, and internet technologies into a single, powerful, easy-to-use system.

How OptixWeb works is that businesses can select and push portions of their document databases to their corporate intranet or the entire internet if desired. Doing this allows you to access OptixWeb by any phone or tablet that has a connection to the internet. If that makes you worry about security and confidentiality, keep reading, we'll get there. So, not only can you access your documents, but Optix Web also supports workflows.

As we said earlier, not all organizations using a DMS will need mobile document management. With that being said, there are use cases where mobile document management is necessary. For example, you may have an accounting supervisor that needs to approve/reject invoices or expense sheets after hours or over the weekend. If you have a workflow set in place, they can log into Optix on any mobile device and examine their workflow "to do" list, retrieve invoices, and review the invoice to decide if they will approve or reject it. Once approved or rejected, the workflow package moves to the next step depending on what was selected. This can help make sure that no matter where you are, you can still process and move your documents in necessary situations. Although not all businesses will have this

specific use case, there are still benefits of using mobile document management with Optix.

Convenience & Efficiency

One of the main reasons we see people wanting mobile document management is convenience. There are use cases where people within your business may need the convenience of retrieving documents without having a desktop. A great example of this is if your company has a warehouse to pull inventory. As your orders come in through your DMS, you may have a workflow set in place that assigns the correct order to a particular section within your warehouse. Without any mobile document management features, the people on the warehouse floor would need to go to a desktop or laptop to see the required information. Depending on the size of your warehouse, this could lead to backup within production. However, with mobile document management, like OptixWeb, you could give each section within your warehouse a tablet that allows them to be on the floor while assessing their appropriate documents and workflow notifications. Having this feature can increase the productivity and efficiency of your warehouse while illuminating any back and forth between departments.

Quick Access

Finding documents with Optix on a desktop is quick, easy, and efficient. We wanted the same experience with OptixWeb so that our clients can have the same quick access wherever they are. This benefit of quick access when it comes to OptixWeb and mobile document management can help increase your customer's satisfaction. For example, your sales representative may get requests from a client while out in the field or over the weekend. If they don't

have a proper desktop at home or nearby that is connected to their document management system, they will have no way of getting those documents to the client in time. With OptixWeb, your sales rep will be able to log into Optix via phone or tablet, search for the document needed, revise it accordingly, and email it to the requesting client, making it just as easy as if they were in the office. This gives you the power to quickly access documents and send them remotely, away from your physical office.

Confidentiality & Security

One prominent feature of a sound document management system is security. A DMS is where you keep all important and sometimes confidential information. The last thing you want is information to get into the wrong hands. So how do you protect your documents if you publish them to the internet for mobile document management? With OptixWeb, all users who want to access the system on a mobile device will need to have the appropriate ID and password. It gives you that extra sense of security, knowing that although your documents are retrievable via mobile devices, not everyone can access them. Another benefit of OptixWeb is that you can pick and choose what documents you want to access remotely. Usually, when we get requests for mobile document management, those clients don't want all documents to be pushed. For example, you may have confidential client information that you feel uncomfortable pushing to OptixWeb. Still, you do have invoices and processes that you want your employees to have access to remotely. Having the ability to pick and choose the type of documents you want to be accessible remotely allows you to have full control without worrying about who is accessing what document.

Questions?

Now that you have a better understanding of mobile document management with OptixWeb the next step is to determine if it is right for your business. Not all companies with a DMS will need or want mobile document management, but to find out if you need it, be sure to talk to an expert. Here at Mindwrap, we have the knowledge and experience to help you make that decision. [Give us a call or contact us](#) today to get started!