



## The Paperless Alternative: Document Management Best Practices

As businesses move towards automated document management and begin to adopt software to remedy their paper-based problems, many will initially feel overwhelmed or discouraged. With many years of paper-based processes, businesses often feel that going against the grain may be too difficult of an undertaking. However, taking the first steps toward automated document management comes in many forms. Some of which can be easily implemented internally.

According to the International Data Corporation, it is estimated that "professionals spend 5-15% of their time reading information, but up to 50% looking for it." Document management eliminates the need to chase down documents, ensuring staff is focused on revenue-generating tasks for the organization. With efficient document management systems, businesses see a dramatic increase in productivity, department collaboration, and a reduction in costs.

By following these 4 document management best practices, your company will be on the right path to efficiency and sustainability. The best part is an automated document management process that can be easily adopted by any business in any industry.

### 1. Consistent File Naming Conventions

Although it may seem like a minor complication, file naming conventions are often an afterthought when an organization considers its own organization process. Consider saving a document you are working on and how you, personally, would name that document. Then, consider sending the same document to a colleague and task them with naming the file in a way that makes sense to them. Would they name the document in the same way? Would they use dashes instead of underscores? Without document search software, these small discrepancies can make finding a document extremely time consuming, leaving staff to guess and attempt multiple searches to find a single piece of information.

Automated document management solutions include features that drastically cut down on time wasted searching for documents. These built-in features allow users to search, view, and open documents quickly and easily based on simple keyword searching. However, it is recommended as a best practice for organizations to implement company-wide naming conventions to further streamline document accessibility across departments and locations.

### 2. Set Retention Policies

About how many file cabinets are in your office? And when was the last time you looked in these file cabinets to find a document? Are there file cabinets that you haven't touched in months? Years even? Chances are, your organization is in desperate need of clear retention policies. Retention policies advise staff on how long a specific document should be kept. For example, nonprofits are often required to hold on to grant information for at least 5 years. Without an established retention policy, it is nearly impossible to efficiently manage a document's lifespan. Often, organizations will hold on to more documents than needed, increasing storage costs and disorganization.

Once a retention policy is in place, it is important for your business to create a process that involves appropriately disposing and archiving documents once they have matured. Intuitive document management solutions allow businesses to scan documents and save them directly into the software platform, making archiving documents a seamless and painless process. Organizations are then able to implement intelligent document workflow management. Once data and information is captured, users can easily create and define custom workflows with automated commands. These commands tell the document management system that once a certain type of document has been held for a specific time frame, it can then be routed internally for further action.

### 3. Secured User Access and Permissions

Consider how many confidential documents you deal with on a regular basis. Do you ever feel that simply saving these documents on your computer isn't safe enough? Well, you're right. A very important aspect of document management is the security of sensitive information and data. Processes should be put in place to ensure all confidential information is carefully handled. If a document containing sensitive information is threatened by an internal or external source, the organization or business can be held accountable for any wrongdoings thereafter.

As a security best practice, permissions should be tied to any and all documents that contain information that is not open to the public. This will restrict unauthorized users from being able to open, move, or delete the document. As an example, documents that contain private information of employees, related to their home address, phone number, and social security number should be owned by the Human Resources (HR) department. In this case, only staff members who work in HR will be able to access these files. Document management software includes strict security options that control access to documents by specifying which users have permissions to view and edit files to ensure sensitive information is always protected. This best practice not only keeps the organization in line, but it also prevents any costs associated with a security breach.

### 4. Leveraging Product Training

When a new paperless process is put in place within a business, it is important to implement it properly and foster its adoption. Businesses often fall short in the follow-through; it is not enough to merely provide documentation on the new process, but to train and support the understanding and learning of the new process with staff members. An important part of effective implementation of any sort is leveraging educational resources. For example, if you are an organization that has recently adopted document management solutions, you may find it useful to better educate yourself on the software and its features and functions to ensure you get the most out of your software investment. This could include helpful demos, hands-on exercises, and webinars that allow you to learn more about all of the products on your own time.

Therefore, should you come across any barriers when working with the new system, you will be able to quickly resolve the issue yourself or find the answer to your specific question. In order for staff to feel confident in the switch to a document management software, a consistent effort should be made by the organization to ensure any and all staff members that will use the software are properly informed and trained.

As your business works to implement automated document management, it is important to keep in mind these best practices to ensure the adoption of this process is seamless. To turn your standard processes into best practices and better understand how to solve your organization's pain points, contact Square 9 to learn more about how our enterprise content management solutions can benefit your organization. <https://www.square-9.com/>



Marketing Communications Specialist **Ashley M. Gonzalez** the voice behind Square 9 Softworks's weekly blog articles. Committed to communicating today's common challenges in paper-based processes, Ashley provides in depth analysis into the document management industry and the solutions that accommodate the needs of end user communities. For additional information, please contact Ashley at [agonzalez@square-9.com](mailto:agonzalez@square-9.com).