



Converting to a Paperless Process with Document Management Software

On average, employees spend 50% of their time searching for information while taking an average of 18 minutes to locate a document. Wouldn't it be so much easier – *and less stressful* – if you didn't have to search through stacks of papers to find what you're looking for? With this logic, the decision to implement [document management software](#) should be a simple one. The hard part is deciding where to start. In order to gain immediate benefits of document management software, it's important to determine the best starting point for your company.

First, analyze each department. Which one could benefit from reduced printing, document storage and paper distribution? This may be a more difficult question for some organizations over others, but in my experience, most businesses will start in departments like Accounting or Human Resources. But of course, the choice is yours! Once you choose the department, it's time to decide when and what to manage within it. By putting time into analyzing the lifecycle of your department's documents and processes, it will help you create the most efficient document management solution for your business. Let's take a look at the lifecycle stages of a document and give you an idea of how to completely optimize your document management implementation.

Stage 1 - Capture

Managing your documents from the very beginning is the key to proper efficiency. Whether in paper format or digital (Microsoft Word, Excel, Outlook, etc.) your data needs to be collected. By scanning documents into a system, your data is automatically indexed for proper organization. Document management software stores your documents to an area you designate, that is secure and completely organized by title, subject, keyword, and other methods, for easier retrieval later on. This includes the ability to archive emails and their attachments by message properties such as To, From and Subject fields.

Stage 2 - Collaboration

Document sharing is important when you are looking for feedback, editing, or approval on files and forms. This stage is extremely important in a document's journey, as input and changes need to be made in order to finalize. With document management software you are given the tools for revision control as well as the option to send data-centered notifications to the people whose attention is required. Now there is no fuss over which version was last touched. Everything is tracked from beginning to end.

Stage 3 - Management

Once a document has been finalized it can easily be reviewed or approved, or put into a [business process workflow](#). This is the stage of the document's journey where having document management software in place can benefit the most. The software provides users with the option to track who has viewed and edited the document through a live audit trail, while also keeping the document protected to ensure the wrong people don't see it. By putting a document into a workflow, it will route to the appropriate people, send them automatic notifications, allow them to review and approve and can even provide access through any mobile device, while on the go.

Stage 4 - Archival

The final stage in the document lifecycle has far more purpose to it than being just an electronic file cabinet. While storing all your files in one place is great, making sure you don't destroy the wrong ones is critical to your company's retention period. With document management software, archiving your documents through a workflow creates an automatic retention period that you control. The documents are moved to a secure area where a manager is notified and can make the decision as to whether or not the files can be deleted. This helps to avoid compliance issues as well as scrambling for documents when the auditor needs them.

With document management software you have the ability to capture the content from your documents and store it digitally, reducing storage and distribution costs. You will no longer have to print, file, retrieve, or re-file paperwork, giving you more time to focus on the integral part of business that matters most.

Are you ready to start simplifying your business processes with a document management solution? Contact Square 9 to get started!