Spring Cleaning Tips to Consider with Document Management

It's that time of year again - spring cleaning! One area that is commonly overlooked in most organizations spring cleaning initiatives is keeping their enterprise content management (ECM) system up to date and efficient. Cluttered document management software results in decreased productivity, inadequate processes, and legal risks.

Let's take a look at 4 tips to consider when tidying up your ECM solution:

Tip 1: Remove Legal Binding Data

Do all your documents follow a data retention schedule? A data retention schedule establishes guidelines on how long documents must be kept and when and how documents should be discarded. These specific guidelines are put into place based on the type of data, government or industry regulations, legal and compliance requirements. Establishing a proper document retention policy within your enterprise content management system can reduce legal risks and liabilities while freeing up space!

Tip 2: Remove Duplicate Records

In most cases, documents are shared, downloaded and stored by multiple people. This results in multiple copies of the same documents being filed in different locations that often become outdated. A document management system allows you to store the original document where users can collaborate and update documents in real time. Any activity, such as user access, views, or edits, are logged in the audit trail and versioning saves each iteration along the way, giving you the ability to revert to a previous copy.

Tip 3: Remove Unnecessary Information

Information should only be stored if it meets specific legal, regulatory, or operational requirements. Removing unnecessary documents makes locating relevant information that much easier! Creating an indexing system allows users to tag each file with a descriptor so users can easily search and identify documents that can be removed. Workflows keep documents moving through the approval process and will automatically store or discard a document once it has reached the end of its lifecycle.

Tip 4: Remove Outdated Information

Storing specific documents can be beneficial for improved customer satisfaction, record history, and maintaining compliance. Although, most organizations will find that a large percentage of documents being stored in their document management system are outdated and no longer needed. Some key questions to consider when deciding whether or not a document is still relevant is if the document is being accessed regularly or if it adds any business value to the organization.

If your business doesn't already have an enterprise content management system in place, or your in need of a system upgrade, this is the time to invest in one! Square 9's award-winning GlobalSearch ECM software is a highly customizable solution fit to meet the needs of your business or industry. Contact Square 9 Softworks today to get started with an affordable, easy to use solution for getting control of your business content while reducing the cost of managing information.

Marketing Specialist, **Allison Kiely,** is the voice behind this week's Square 9 Softworks's blog article. Committed to communicating today's common challenges in paper-based processes, Allison 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 Allison at akiely@square-9.com.