

# TEN

important questions to ask about the document management system you are considering:

## Can all my corporate knowledge be stored together?

- How easy is it to route paper and electronic documents to the system?
- Does the system offer full-text search options?
- What file types can be easily entered into the system?
- Will the system automatically enter incoming faxes and emails?
- Does the system do COLD/ERM processing of large reports?
- Is the system folder-based or structured like a database?

## How well will the document management system integrate with my current system(s)?

- Has the system ever been integrated with my business software before?
- Can I avoid having to enter information into both systems?
- How will the system integrate with new business software, should I decide to change?

## What is workflow and how will I benefit from it?

- How will the system help me to track documents throughout the workflow process?
- Can the system help implement and enforce company policies?
- Does the system allow more than one person to work on a document at a time?

## Is the system scalable enough to meet my needs, both now and in the future?

- How much room do I have to grow with the system?
- Is there a storage limit?
- Is the system diverse enough to work across all of the departments of my business and from different locations?

## Does the system allow all your business practices to be accomplished remotely?

- Can I work remotely through a full-Windows client as well as a browser?
- Will hardware such as my scanner be able to operate remotely?
- Can the system operate in a Citrix or a Terminal Server environment?
- Does the system offer the same security even off site?

## How secure is the system?

- How can I tailor security to suit my needs?
- What different layers and levels of access does the system offer in terms of security?
- Can I restrict users from performing different functions such as viewing, printing, emailing or exporting?

## What efficiency tools should I expect from a document management system?

- Can I instantly access all of my corporate information?
- Can I easily stack documents to assemble new documents?
- How can the system help me fill out forms?
- Can I edit text of documents scanned in as images?
- How can I protect sensitive information on a document or highlight important content?
- How easily can I distribute documents from the system?

## Does the system have features to support accountability, auditing, and management needs?

- Does the system track every action performed by each user with details such as workstation, network address, time and date?
- Can managers easily monitor the progress of employees to help evenly distribute tasks and ensure productivity?

## What protection does the system provide in the event of a disaster?

- How soon after a disaster would I be able to access my information and resume business?
- Does the system provider offer a backup storage solution?

## Does the system comply with current legal standards and government regulations?

- Does the system automatically enforce document retention policies?
- What kind of encryption does the system use for passwords and image storage?
- Does the system protect all files from being tampered with?
- Are documents in the system as legally valid as the original?

To learn more about finding the best document management software for you, visit [www.PaperWise.com/10Essentials](http://www.PaperWise.com/10Essentials) or call 417.877.0003



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