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BestPractices

Document Management





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Best practices for document management

How many documents, spreadsheets, and presentations do you handle in a day? Two? Five? A dozen?

Now multiply that across your entire organization. Thousands of proposals, invoices, contracts, and other documents are created, edited, and shared by your teams every 24 hours.

With so many documents generated each day, how can you effectively work with colleagues to co-author a document? How can you be sure that a proposal has been validated? And how can you store, locate, and share the right document with your team?

Document management solutions have arisen as a way to address the challenge. Typically these tools are used to overcome the document chaos that many legal, finance, human resources, and operations professionals feel when confronted with tens of thousands of files.

But how do you choose and implement the right document management solution for your organization?

Let's walk through 8 steps that will help you select the tool that is right for you.



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Document Management Software 8 Steps to Success

Analysis	Selection & Preparation	Implementation
1-Define Objectives	4-Identify Requirements	7-Get Started With the System
2-Identify Business Processes	5-Demo Candidate Systems	8-Accelerate Adoption
3-Determine Delivery Model	6-Prepare the Groundwork	





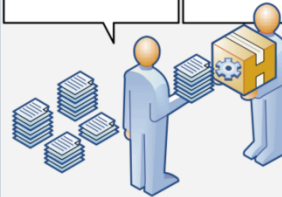
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1. Define Objectives

What will the business achieve by using document management software?

REDUCE
PAPER

INCREASE
EFFICIENCY

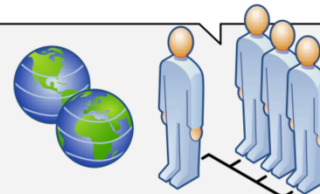


ENHANCE
COMPLIANCE

ENABLE
ACCESS



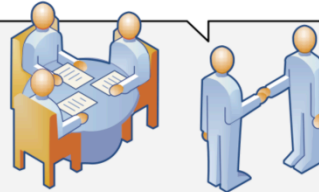
PROMOTE
COLLABORATION



2. Identify Business Processes

Which document-based business processes can be made more efficient by using document management software?

CONTRACT
MANAGEMENT



HUMAN
RESOURCES
EMPLOYEE
ONBOARDING



INVOICE
PAYMENT



ROUTING &
APPROVALS



REVIEW &
FEEDBACK





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1. Define objectives

Before embarking on a document management deployment, you should know what success means. Some common goals for document management are:

- > Increasing efficiency by helping users to quickly locate and share documents.
- > Reducing paper consumption by connecting document management tools with fax servers and scanners, keeping all documents electronic.
- > Promoting collaboration by allowing teams to work together to co-author documents. This can radically increase quality as colleagues' insights can be included and managed.

> Ensuring compliance with regulatory regimes by securely storing and monitoring access to documents.

Regardless of your goal, by beginning the process here you can better understand your criteria for selecting a tool.

2. Identify business processes

The next stage is to determine which business processes would benefit from tooling. This helps to boost adoption and demonstrate value in your organization. Good processes for documents management:

> Require reviews and approvals before a document can be finalized.

> Have periodic re-evaluations of documents, for instance for contracts that are renewed annually.

> Involve a high-degree of collaboration across teams, with multiple team members contributing or editing content.

Typically, you'll find processes like contract management, employee on-boarding, sales proposal generation, and invoice payments are strong candidates for document management.





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On-Premise

Pros: More control over infrastructure, no internet connection required, increased customization possible

Cons: Costly capital investment in infrastructure, intensive use of IT resources, longer implementation time, hardware upgrades and maintenance required

3. Determine Delivery Model

Should the document management system be on-premise or hosted?
What are the key considerations for each approach?

Hosted/Cloud

Pros: Predictable monthly cost, access from anywhere, quick to deploy, low total cost of ownership (TCO), secure offsite storage, painless upgrades

Cons: Perceived loss of control over data, reliance on internet connectivity, reduced customizability



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3. Determine your delivery model

Document management has evolved significantly since it was first envisioned. Now, you can choose on-premise software that is installed on hardware you purchase, or cloud models that reside on secure servers off-premise. Which model you choose will be a factor of your organization's structure and how it will use the technology.

On premise technology gives you control over your physical infrastructure. It does not require an internet connection, and you generally customize these installations heavily.

There are drawbacks. The capital outlay and ongoing upgrade and maintenance costs drain IT resources that could have been deployed toward innovation. Also, to access the repository generally requires access to a VPN, which can complicate usage.

Cloud-based software has the advantage of a predictable, generally lower, monthly cost.

Cloud-based software has the advantage of a predictable, generally lower, monthly cost. These tools tend to be easy to use, quick to deploy, accessible from any internet connection, and intuitive for users. And since cloud infrastructure is managed by a specialized team, there is a strong regimentation of security and up-time protocols.

However, some perceive a loss of control when a tool is run in the cloud. Further, there may be a loss of customizability in some tools. And cloud-based tools that lack desktop synchronization will be inaccessible when there is no internet connection.



4. Identify Requirements

What features and characteristics must be present in your document management system?

MICROSOFT OFFICE
INTEGRATION



TIME-BASED
ALERTS



CUSTOM
METADATA



GROUP &
ROLE-BASED
PERMISSIONS



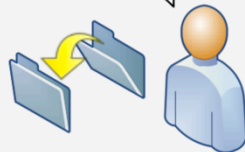
4. Identify Requirements

What features and characteristics must be present in your document management system?

COLLABORATION &
ACTIVITY FEEDS



FILE SYNCHRONIZATION



OFFLINE
BACKUP



SEARCH &
QUERY





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4. Identify requirements

Now, we can move into the evaluation of which document management solution makes sense for your organization. There are many functional attributes beyond deployment models that you should consider:

> If your team is a heavy user of Microsoft Office, integration into that suite makes sense. This typically allows you to download the latest version of a document, edit or co-author it, and check it back in without version conflicts.

> Documents that must be periodically reviewed can be better managed with alerts. Alerts can be set at specific times or for lengths of time to notify you or a team that a document must be reviewed.

> Managing the lifecycle of a document so that the correct people review, contribute, and authorize it before it is completed is a key attribute for many users.

> Finding a document among tens of thousands is not easy. You need to be able to assign rich descriptions that help users locate what they need.

> Your search capability should allow you to look within a document and within metadata so you can quickly find what you and your colleagues have stored.

> Collaboration among team members has been identified as one of the most critical elements of a document management tool. With activity feeds and the ability to share ideas, your documents are enriched.

> You want to ensure that you have access to your documents on a global basis, wherever you need them. Internet-powered tools allow you to easily access documents from any connected device.

> Security is always important. Are there tools to ensure user authentication? Are there offline backups and other disaster recovery protocols?

With the right requirements identified you can better choose the right system for you.



Criteria	Budget/Timeframe
Cost	Affordable
Ease of use	Right now
Learning curve	

Buy it!!!

5. Demo Candidate Systems

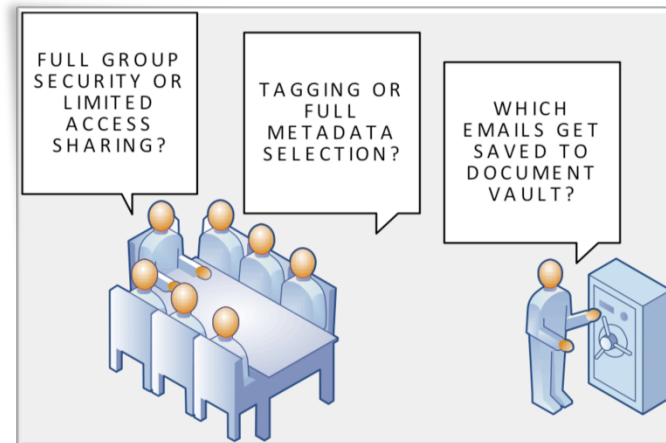
What are the selection criteria? What is your timeframe and budget?

Taxonomy
Kinds of documents
Required metadata
Groups
Roles & Permissions
Syncing & backup
Policies



6. Prepare the GroundWork

How will your documents be organized? Who will have access to them?





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5. Demonstrate candidate systems

Now that you have defined the criteria that will lead to a decision, the next step is to evaluate which tool makes sense. A good step is to narrow the selection by trialing software. Some tools do offer the ability to try before you buy. Then, once you have identified and weighted your criteria, you can contrast the various solutions and select your winner.

6. Prepare the groundwork

You want to ensure that your document management tool is well used and well structured. Your aim is to overcome document chaos, and that starts at this stage. You should look into criteria like:

- > What kind of documents do you plan to store? Will there be contracts? Invoices? Understanding the types of documents will affect how you group, name, and secure your documents.
- > What is the taxonomy of your documents? You can generally organize documents into folders; by setting a base model up-front, you'll get a leg-up on organization.

> You can also organize documents using descriptors and metadata. By determining which metadata is required, you can enforce policies and ensure that documents are easy to group and locate.

> Different users and groups will need access to certain documents, and some need to be restricted. You should assess which groups will use the tool and what they should be permitted to access.

Because many users will access the document management tool via Microsoft Office, it's important to integrate with the suite.



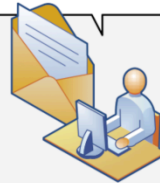


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7. Get Started With the System

What is needed to begin using your document management system?

ADD USERS
VIA EMAIL



BULK
UPLOAD
DOCUMENTS



INTEGRATE
WITH
SCANNING
AND
CAPTURE
SOLUTION



CONFIGURE
BUSINESS
PROCESSES



ENABLE
SINGLE
SIGN- ON



INTEGRATE
WITH
MICROSOFT
OFFICE AND
OUTLOOK



8. Accelerate Adoption

What do your users need to become productive with the document management system?

START
COLLABORA-
TING



INSTALL
DESKTOP
TOOLS



COMMUNICATE
DOCUMENT
MANAGEMENT
POLICIES



SHARE
DOCUMENTS



TRAINING



SUCCESS !!!





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7. Get started with the system

Now we're ready to start rolling out the system to users. A thought-through plan will make rollout simple to complete.

- > Tools often have an email notification system that allows you to invite users and provide them with a sign-up process.

- > The more relevant documents in the document management tool, the more incentive users have to use it. Some tools offer bulk upload functions that make it easy to add thousands of documents at once, increasing momentum.

- > Many of your documents will be created via scanning existing paper documents, or via a fax server. Integration with these technologies can further simplify the addition of large numbers of documents.

- > You should make sure that business processes are tuned with your document management tooling. This could mean setting up workflows for approving or processing documents that match your preferred lifecycle. It could also mean creating pre-configured folder templates for standard activities, like all content needed for a new client.

- > Because many users will access the document management tool via Microsoft Office, it's important to integrate with the suite. Generally, these tools are add-ons that can be simply downloaded and installed as a supplement to a document management tool.

8. Ensure adoption

The proof is in the execution. You need to make sure that your teams are effectively using your document management solution. Typically, a network effect occurs with document management: as more people use the technology, more people are attracted to it. To ensure adoption:

- > Make training available through online training and discussion boards. That lets people get comfortable with using a tool. Of course, the more intuitive a tool is, the simpler this step becomes.

- > Communicate policies to co-workers so they understand the taxonomy and policies for your document management tool. That will ensure that proper organization gets off to a good start.

- > Start collaborating and sharing. The network effect will get going when you start including colleagues in your process. So, share your documents. Include them in the editing and content creation process. Make sure that the right people are incorporated into document lifecycles.

Conclusion

When your organization depends on documents to be well-controlled, you need to implement a document management solution.

Following these 8 steps and best practices, you can successfully choose and launch tooling and rein in document chaos.