

# What is a **Document Management System?**

A beginner's guide to managing documents from paper to intelligent automated workflows.



Educational eBook Series

## How organized is your business information?



The pandemic has forced businesses to become “paper-lite” by the sheer nature of how, where and when we work. Simply converting paper documents to intelligent digital files isn’t enough.

Everyday knowledge workers wrestle with version control, manual steps, unsecure access, and collaboration issues simply because their information is unorganized.

Critical, time sensitive information that’s trapped on someone’s computer, shared drives or other silos that stifle workflow productivity and create avoidable security threats.

## DOCUMENT MANAGEMENT DEFINED

Document management refers to the automated system or process use to store, track and capture electronic documents such as PDFs, processing files and digital versions of paper-based content.

With a document management system, you’re able to effectively digitize, tag, organize, secure and automate business processes using a more structured, systematic approach to drive business efficiency that can achieve more, faster and with fewer errors.

Are you managing your documents or are they managing you?

81%

of remote workers need access to corporate documents.

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92%

of professionals collaborate on and review documents via email.

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50%

of a knowledge worker’s time is spent on creating and preparing documents.

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What is a Document Management System?



Could your business benefit from a document management system?

## Common Challenges

Paper based processes requiring human effort cause avoidable delays, errors & security threats.



### Paper-Intensive Processes

Lack of digitization & reliance on hard copies



### Manual Steps

Time consuming tasks



### Silos of Information

No centralized, digitized repository



### Slow Approvals

No digital signatures causing delays



### Exposing Confidential Information

Unprotected files and no user restrictions

## Popular Solutions

Digital transformation opportunities drive productivity, collaboration and security protection.



### Paper to Digital Files

Save time, space & costs



### Automated Digital Workflows (AI)

Faster cycles, less errors



### Centralized, Searchable Repository

Simplified collaboration, indexing & version control



### Digital Signatures

Quicker approvals



### Secure, Restricted Access

Risk mitigation with user permissions



## Self Assessment Questions


Find out if a document management system could help your business.

- |  | YES                      | NO                       |
|--|--------------------------|--------------------------|
| 1. Do you have a digital, centralized repository for secure collaboration? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Has your organization transitioned from paper to digital documents?     | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Have you automated your AP & AR processes?                              | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Do you still store documents in filing cabinets or storage facilities?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Have you implemented a document management system?                      | <input type="checkbox"/> | <input type="checkbox"/> |

Need help? We're ready when you are.

### About Modern Office Methods

Modern Office Methods (MOM) has been a business technology provider since 1957. Throughout our more than 60 years in business, we have experienced steady growth and evolved to provide a holistic suite of business technology products and services to help our customers be more productive, control expenses and protect their confidential data. We are active in the Ohio communities we serve and have earned a pristine reputation for personalized service. You can count on MOM.

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