

How do I choose the right Document Management Solution?

There are many different kinds of document management solutions (DMS) out there today. It can be a challenge finding the right one to fit the needs of your business. DMS can range from a simple database or excel spread sheet, a shared network drive, a cloud storage solution, and specialized DMS software, either located on a server or in the Cloud.

To choose the best option you need to consider:

- Budget- how much can you afford?
- DMS- do you need the added tools and features from a fully functional DMS software?
- Server or Cloud-Based- are documents hosted on server or in the cloud?
- Document Type- there are different solutions for different document sets

Budget

Obviously, choosing the right DMS for your business depends on how much money you have to spend. The more documents, features, and tools, the more expensive your product becomes. Luckily, there are good options for all budgets. The key is the ability to search and find information quickly.

Document Management Software

Do you need a lot of functionality added to your document management software? For small document sets, a simple database could do the trick. If the correct metadata is captured, new documents can easily be added, and files can be hyperlinked, a database could work out well.

However, many businesses quickly outgrow the simple database. They need more functionality such as version control, workflow automation, document security, and customization. They need to import different document sets that have different metadata, processing, and workflow needs.



Server or Cloud-Based

The decision to store your information in-house on a server or put it in the Cloud depends on the needs of the business.

Storing information on an In-House Server gives you physical control over your backup, keeps critical data in-house without a third party having access to it, internet access is not needed to access the data, and it can be cheaper for small to mid-sized companies. However, you might need to make a capital investment to buy hardware and infrastructure, you need physical space to store racks and servers, and your data could be at a greater risk if a disaster such as a flood or fire strikes your location.

Cloud-based storage solutions also have their pros and cons. The advantage of a cloud-based solution is access to your documents from anywhere, no need for on-site hardware, storage is scalable and you only pay for what you need, backups can be initiated from anywhere and can be as often as 15-minute intervals, minimizing losses in disaster situations. The disadvantage is that the cloud-storage is an on-going cost, paid monthly or annually, you are dependent on internet access, and data and storage limits according to the chosen plan.

Document Type

There are different document management solutions which are customized for different document sets. For example, DMS are very different for medical records, HR records, legal files, facilities documents, and other document sets. A specialized DMS for your department could make much more sense than purchasing a general DMS that has less specialized functionality. However, with different systems, documents are segregated from each other. Departments need to decide if integration is necessary or not. HR staff may not need to have access to facilities documents or contracting documents. Integration may be less important than functionality.

archSCAN can help you narrow down the choices to pick the best document management solution for your business. We make the transition from one system to the next as painless as possible and can format the information for an easy import.

Contact archSCAN today for a free consultation regarding the right DMS system for you.