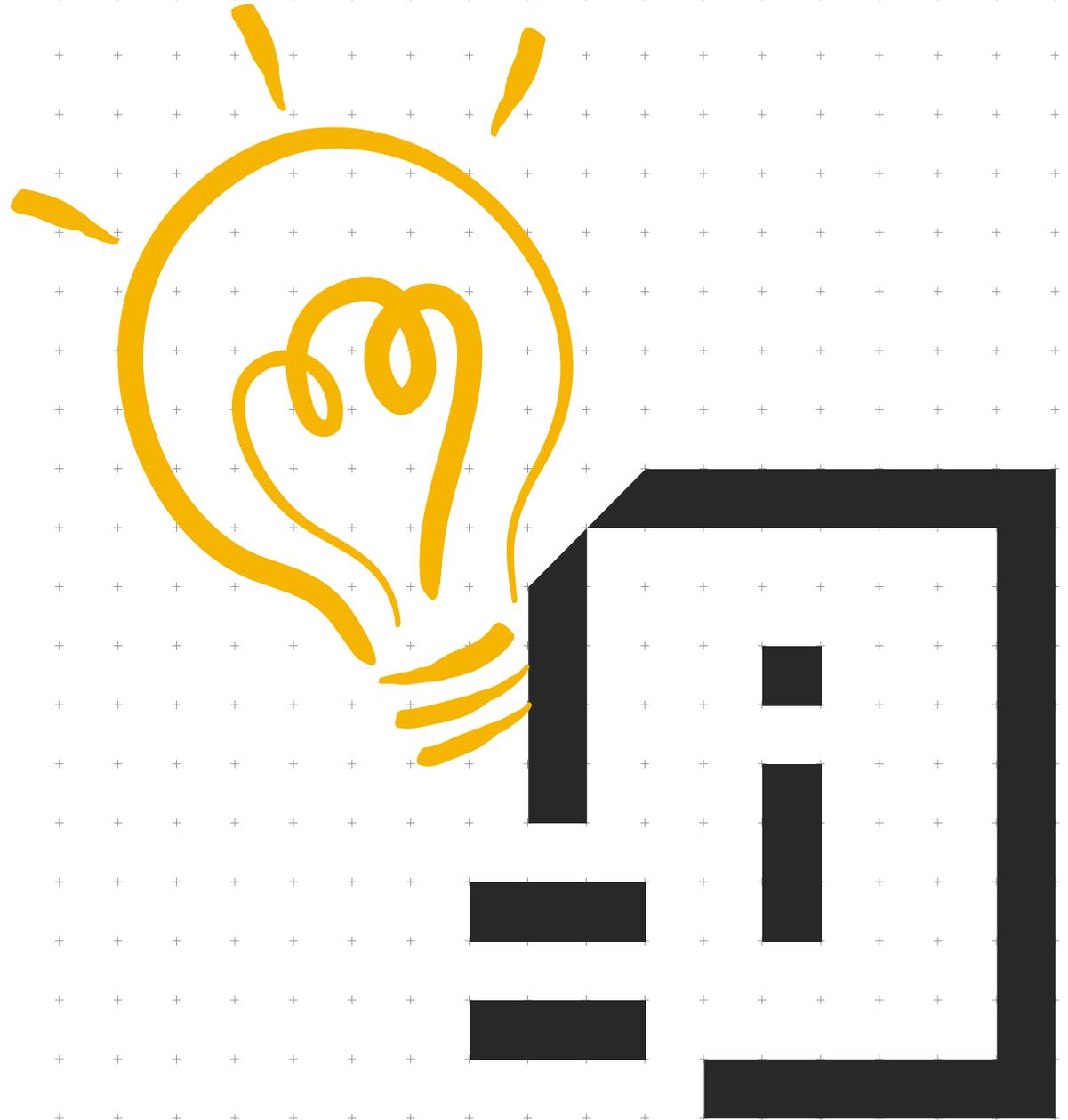
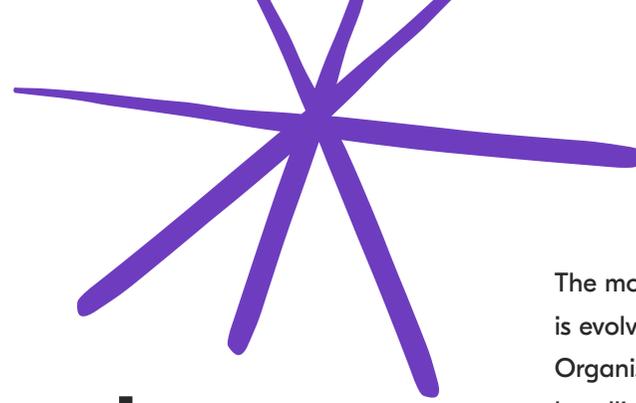


Ultimate Document Management System Buyer's Guide

Includes Free System Comparison Template





The modern business environment is evolving faster than ever before.

The modern business environment is evolving faster than ever before. Organisations face the pressure of handling vast amounts of content while still being required to take quick, decisive action. Efficient processes, secure, transparent workflows and open, flowing communication are all essential in the management of such information for agile decision-making.

Some companies still lack the tools they need to put their information to work. Fortunately, digital innovation means simple upgrades to your document management system software that will [improve efficiency, productivity](#) and reduce costs.

Those that work heavily in physical environments and require paper sharing for essential documentation, not to mention record keeping, audit trails and security, have options. Rather than errors, delays and data losses which make it impossible to 'work smarter' and get ahead, companies are now turning to digitisation to improve efficiency and accuracy.

We have designed this guide to help you understand the fundamental building blocks of document management systems and the key features to look for. This guide will help you develop your requirements list and choose the right solution for your business.



What is a Document Management System?



[A document management system](#) is a system that tracks, manages and stores documents in an effort to reduce paper complexities. In its simplest, more traditional form, it is a filing cabinet. Today, with the need for speed, collaboration and communication, the humble filing cabinet is now digitised. Still, it helps to think of it as a tool that helps you store, manage and find what you're looking for. Most digitised document management systems today will have the added benefits of tracking versions and users and managing permissions too.

An advanced document management system will help you to streamline your document management, improve productivity, cut costs and reduce your company's environmental footprint.

Who this guide will help

Whether you are a large corporation or SME, whether you're still using paper documents or digital documents (or a combination of both), your business can benefit from Document Management System.

Let's talk about some of the most common document management challenges most businesses come up against.

The true cost of a paper-centric workplace

Paper everywhere. In filing cabinets, archive boxes, desk drawers. Paper documents are risky business, they can easily be lost, misfiled or stolen and they can take an age to sort and find.



What is a Document Management System?

Issues with version control

Version control problems are common if you're still using a paper document management system or working in shared folders, but also likely if you're using an ineffective digital system too. Bad version control leads to lost time (e.g. tracking down the 'right' document), double-handling (e.g. manually merging two documents when work has been done on an old version) and inefficient collaboration (e.g. multiple employees working on different variants of the one document).

A decentralised and unsecured document database

Whether your company is still relying on a filing cabinet system or you're storing documents digitally, in multiple locations (PC folders, emails), or a hybrid of the two, it's easy to lose files without a robust system in place. Accessing documents from outside the office is difficult, and security can frequently be compromised.

Is this you?

This guide will help

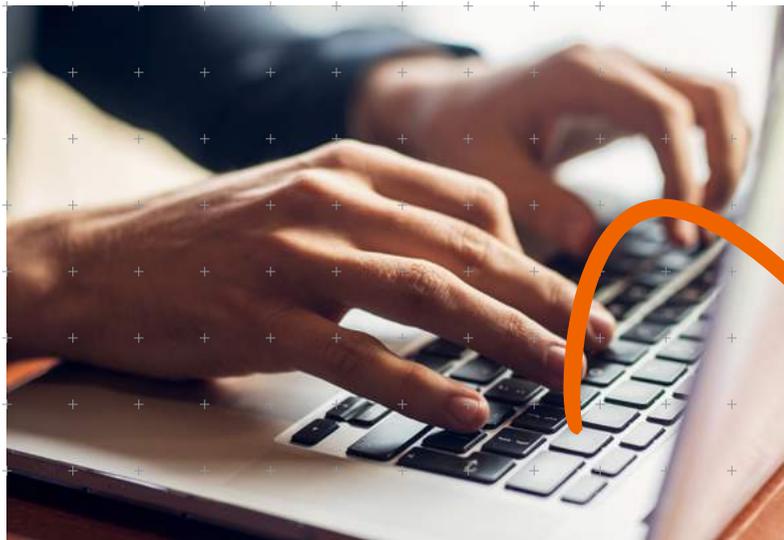
Going step-by-step through this guide will assist you to:

- Define your company's needs and goals
- Understand the fundamentals of DMS
- Identify the key features to look out for
- Compare solutions to find the perfect fit for your business
- Ensure you pick the right software solution and vendor.



Defining your company's needs

Understanding your company's needs is critical to finding the document management solution that is best for your business. It will help you to identify the functionality required and make a choice based on evidence rather than assumptions. This part of the guide is designed for you to capture this evidence and you may need to talk to different stakeholders in your business to answer the following questions. It may also be a good idea to return to this section and complete it after you have read the entire guide for further context.



What challenge or problem should this solution solve for you?

Take a moment and write down the 3 biggest problems that you need DMS to solve for you.

- Easily manageable content for search and retrieval
- Workflow transparency for work in progress
- Centralised document storage and collaboration
- Other

What is your main objective in implementing a DMS?

- Simplify convoluted paper driven processes
- Compliance with regulatory requirements
- Get rid of paper filing cabinets
- Other



What are some non-negotiable and nice-to-have features you need and why?

Non-negotiable

- Document workflow automation - automate repetitive processes
- Records management helping to manage information through its lifecycle
- Cloud solution - ensuring scalability and flexibility for the business
- Other

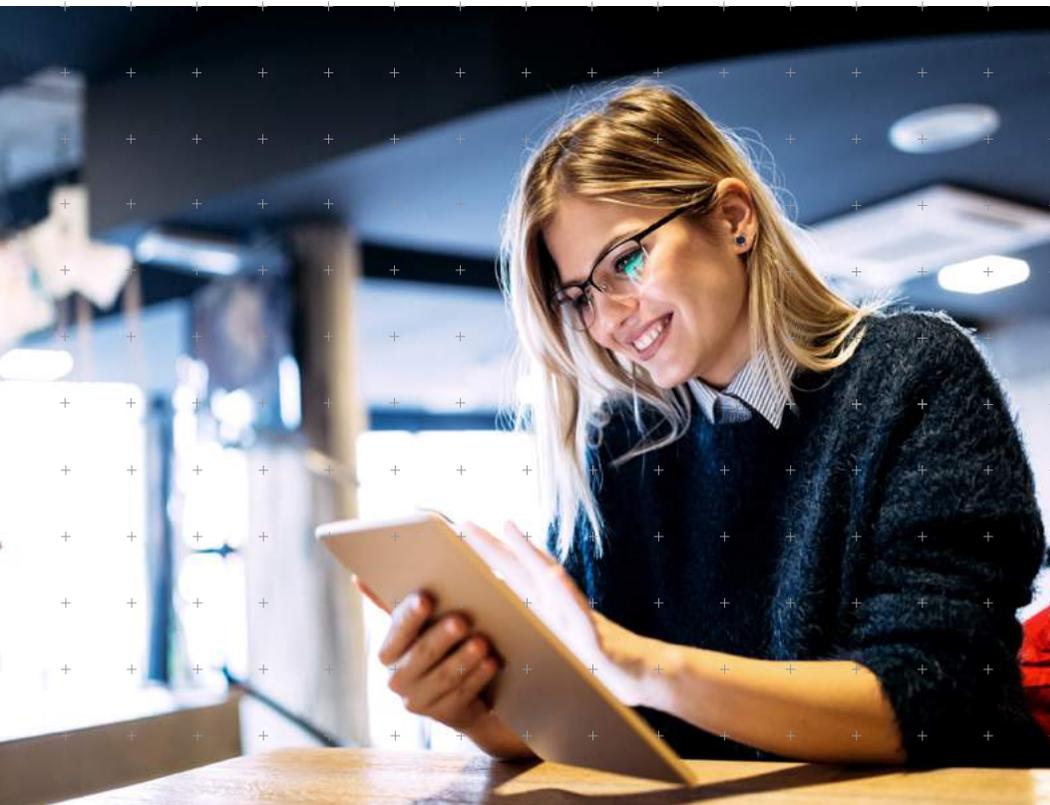
Nice-to-have

- Smart device integration for remote access to files
- Digital forms that prevent double data entry
- Content capture for digitising documents
- Other

What post-implementation improvements do you foresee your business experiencing with the right DMS?

- Review document history through transparent lifecycle
- Full visibility and accessibility to content via integration with other systems: e.g. ERP / CRM
- Faster workflow in previously paper-driven processes
- Other

The fundamentals of a document management solution



There are a few core considerations you need to take into account when you're looking for the right DMS fit for your business, regardless of size or industry. It's important to be aware of these early on, so you are able to make the smartest decision for your company.

On-site vs cloud-based

An on-site document management solution requires the use of your company's servers and storage space. It probably also means you're responsible for the maintenance of the system and the security of your documents and data. On-site systems can be installed in a private cloud managed by the provider or your organisation.

A benefit of an on-site system is your business has full control at all times and you're not relying on an outside provider. Of course, there are costs associated, both upfront and ongoing, like annual software updates and keeping secure backups.

On the other side, there is a cloud-based SaaS (Software as a Service) system, which is hosted by your software provider and accessible online. Generally, there are lower upfront costs associated with this option, and your business is more likely to pay a monthly or annual subscription fee as an operational, instead of capital, cost. Your provider will look after system maintenance, software updates and security. One of the biggest benefits is being able to access the system securely from any device with an internet connection.

Integration

Does your business have software applications already in use? Think about whether these programs need to integrate with your new document management solution. Some valuable integrations are with email clients or customer relationship management (CRM) or your ERP software.

In-house expertise

Think about how much expertise in document management your employees currently have and if you will need to upskill your staff. If the levels of expertise are low and the resources (or aspiration) to upskill aren't there, look out for a system with excellent support, user-friendly design and preconfigured workflows to make the transition as seamless as possible.

Onboarding and support

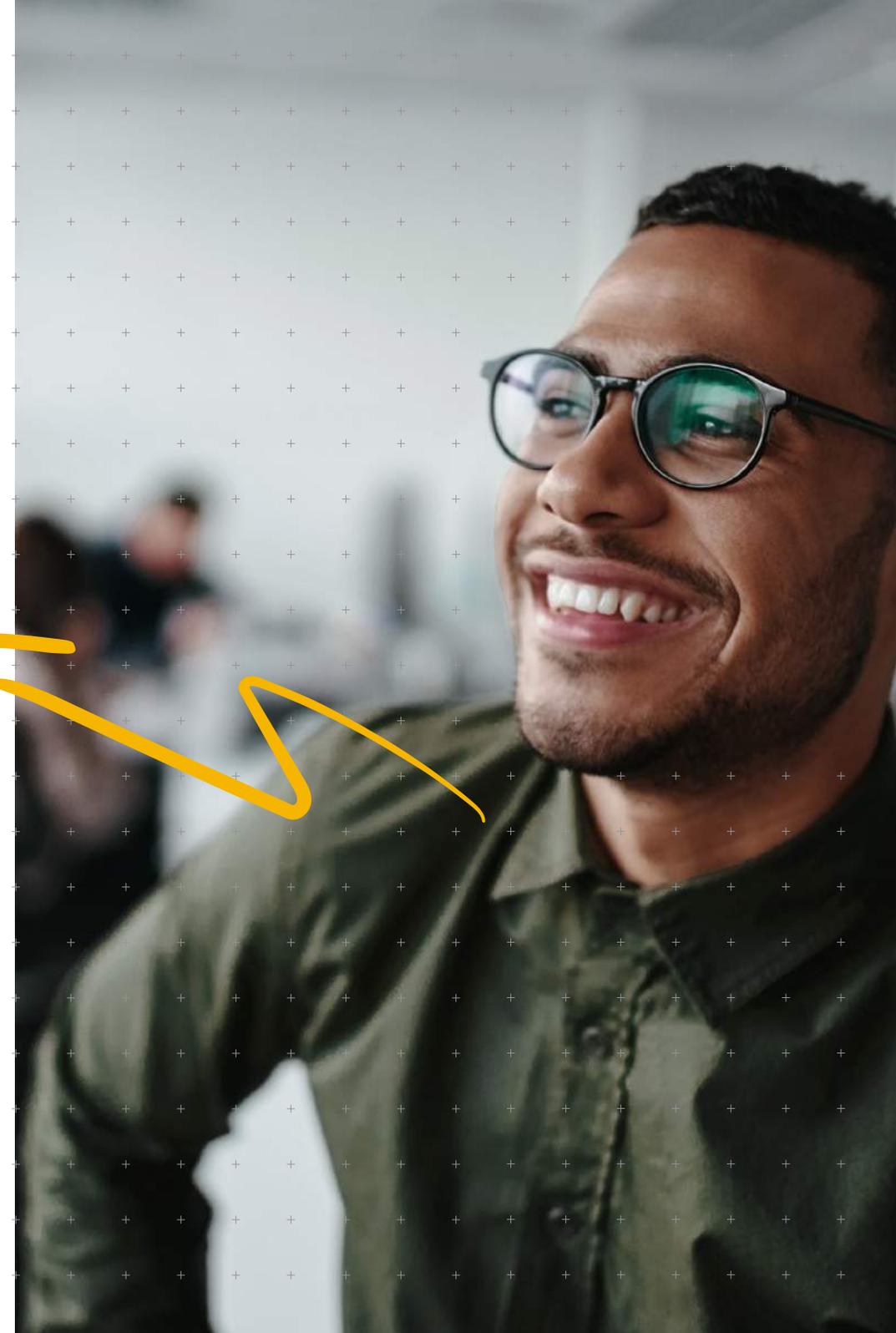
Consider the onboarding process of your DMS solution and how it will affect business as usual. Different systems will have a range of impacts, so keep that in mind. Also take some time to consider what training your vendor will provide as well as the ongoing service, maintenance and support included in your software solution. Phased implementation, improving the most important, then urgent and other processes is the approach to consider.

Cost

Depending on the solution you choose, there are different pricing structures you may come across in your research. These include:

- Subscription plans (month-to-month or annual fee) - costs vary depending on conditions like number of users and level of support provided.
- Self-hosted solution costs (perpetual licensing) will be associated with your own servers, storage and maintenance.

Also take into account the costs affiliated with implementation, training and ongoing support and maintenance.



Knowing which features to look for

Now we've covered the basics, let's review a few key features to keep an eye out for.

Intuitive document storage structure

Your chosen system should offer a user-friendly document storage structure that is intuitive to use. The aim here is that users will recognise the structure, require little training and be able to quickly pick up how and where to store documents within the system.

Rigorous version control

Frustration over poor version control

is a common trigger for a document management system. Make sure the solution you implement includes stringent and easy-to-use version control settings.

Smart search functionality

Consider how you want to be able to search for documents, aside from the name of the document you may also want to be able to search by date, file

type or even the content inside (i.e. full-text search).

Exemplary user-experience

If your chosen solution is hard to use, it may be an uphill battle to gain buy-in from employees. Look out for an intuitive interface that is designed with the user experience in mind. The more intuitive the system, the less training will be required and the less downtime will be necessitated.

Adequate storage

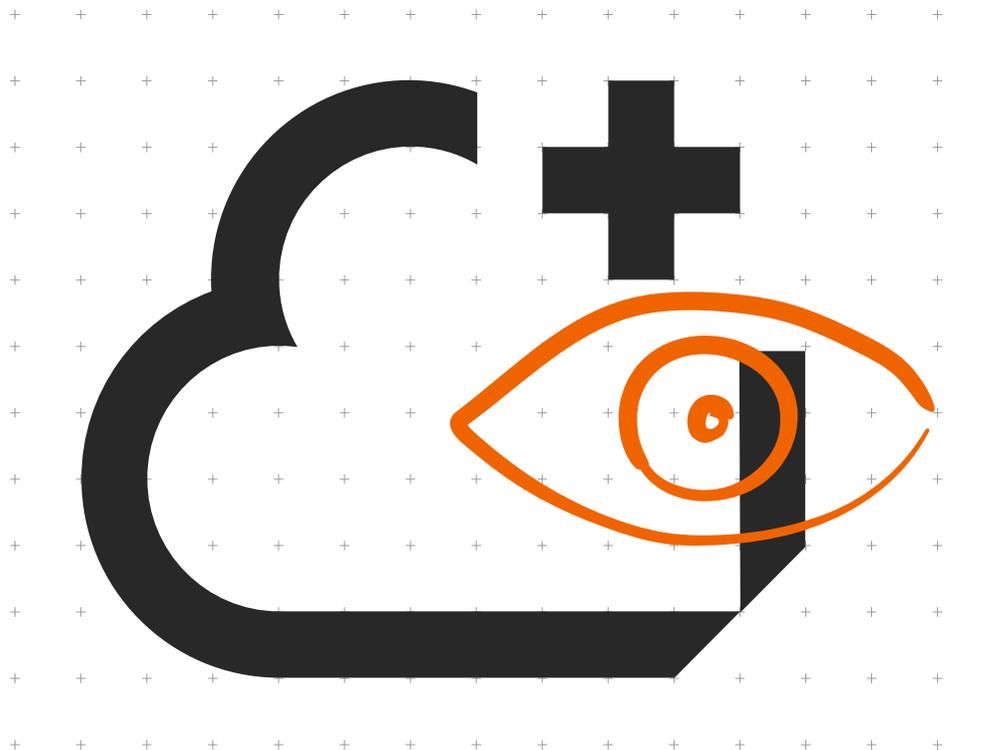
Consider both your current storage requirements as well as the storage requirements of the future. Is the solution chosen scalable for a growing organisation?

Secure remote access

With the reality of a remote workforce, it's crucial to consider if your document management service allows access via laptops, smartphones and tablets. A good solution will allow employees secure access to the files they need from the location and device of their choice.

Integration with key programs

Integration deserves a second mention as it's critical for the success of your DMS solution that your new system 'talks' to existing systems. Ensure that the document management system you pick works with the other programs your company uses.



Why Kyocera for your Document Management System?

Scanning compatibility

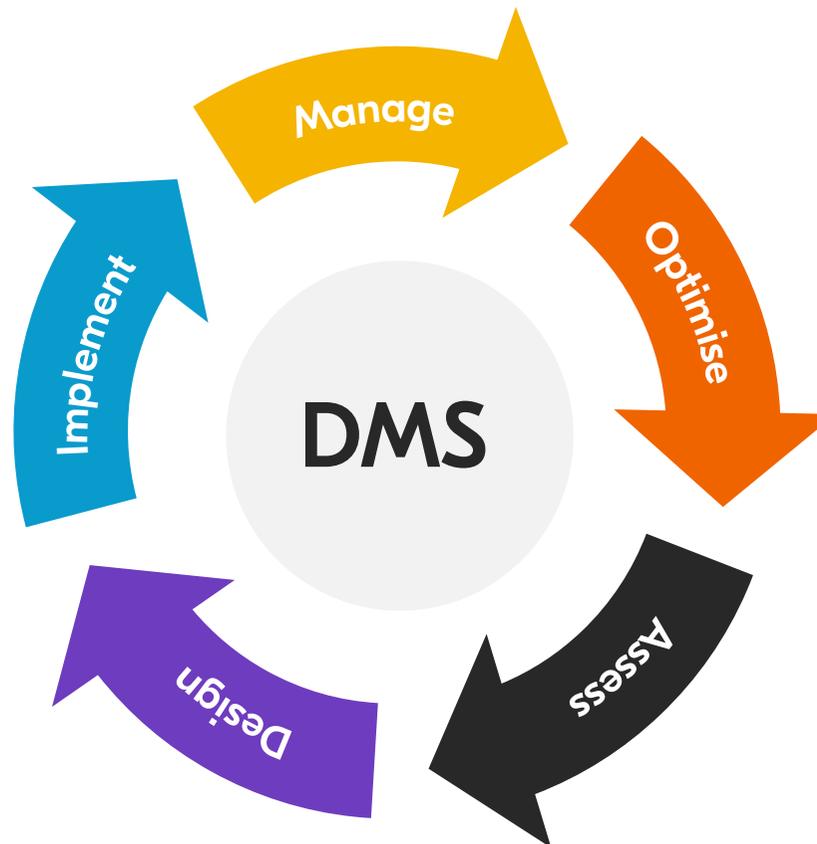
Scanning is an important step in the digitisation process and the compatibility of your DMS with your scanning hardware is critical. Also, consider how your software solution handles scanned documents e.g. does it include image to text (OCR), automatic classification and data extraction functionality?

Leaving an audit trail

The ability to pull information on the path that a document has travelled, right across its lifecycle, is helpful. It may also be legally required to meet your business's compliance or regulatory obligations.

First-class security

Consider [restrictions, permissions and how employees can securely access and work on documents](#). Also, think about the [security of the documents](#) while they are in digital storage or in transit.



Kyocera Document Solutions provides managed document systems for companies of all sizes. We offer a complete solution that is designed to optimise your entire document process from hardware to workflows, ultimately improving your staff productivity.

Our DMS is specifically designed to:

- [Eliminate security risks](#) - giving you greater control and transparency
- [Improve productivity](#) - with improved records management and collaboration
- [Help to achieve significant cost reductions in your company](#) - by improving workflow, productivity and reducing errors.

Kyocera is known for its efficient, economical and environmentally-friendly document solutions. We also guarantee industry-leading support through our fast Help Desk and Remote Monitoring.

[Find out more about Kyocera's DMS here.](#)

Comparison checklist

Feature	Kyocera	Vendor 2	Vendor 3
Capture and organise			
Automatic Indexing AI self-learning technology to extract document content into indexing terms	✓		
Mobile device integration	✓		
Full text/content search	✓		
MFD Integration Connect with any scanning hardware to capture	✓		
Data verification Use data from other applications	✓		
Electronic Forms Customisable web forms for data capture	✓		

Feature	Kyocera	Vendor 2	Vendor 3
Barcode recognition EAN, QR, postal codes or any other barcode	✓		
File import Easily import and index documents via drag and drop or browse method	✓		
Windows Folder structure integration	✓		
Import from Outlook	✓		
Integration with SAP and other ERP systems	✓		
Import from any email account	✓		
Integration with SharePoint	✓		

Feature	Kyocera	Vendor 2	Vendor 3
Processing and managing workflows			
Document Annotation Superimpose information without changing the original documents	✓		
Assignment control Automate recurring tasks	✓		
Document Versioning	✓		
Workflow automation Streamline processes with transparent workflows	✓		
Lifecycle Management Remove data and documents automatically according to preset criteria	✓		
Document rules and exceptions	✓		

Feature	Kyocera	Vendor 2	Vendor 3
Deadlines Set task due dates	✓		
Data export and import Integrate with other systems in your organisation	✓		
Predefined Common workflows	✓		
Dashboard View	✓		
Access and view content			
Flexible and consolidated search	✓		
Mobile access Access and use information remotely from smart device	✓		
Digital files Classic folder structures for intuitive file viewing	✓		

Feature	Kyocera	Vendor 2	Vendor 3
Easy Content Sharing	✓		
Granular permissions	✓		
Content Viewing Access content from common document formats	✓		
Linked documents Link a single document across jobs, projects, departments or any other logical requirements	✓		
Task Reminder Reminders of pending deadlines and overdue tasks	✓		
Automatic delivery Receive documents automatically	✓		
Document export packages Bundle document packages for external use and audits	✓		

Getting the details right

If you've had it with paper filing systems or out-of-control digital documents, then it's the right time to look for document management system software to solve your company's problems.

With so many departments and people impacted, it can be a complex

process to select the right solution and vendor for you. However, we hope this information and checklist has made things a little easier.

By now, you've done the hard work and nailed down your business goals, the features you need, and you've created a shortlist of solution vendors. Time to put it to work.



Your next steps

Schedule a demo

Because you've worked through this document you will have a good idea of exactly what you want from the Document Management System. A great vendor will have a representative who will gladly take you through their solution, explain how it can overcome your business's specific challenges and

answer any questions you may have. A demo will show you a snapshot of the software solution, so we recommend letting the rep know in advance the most important features you would like to see demonstrated on the day.

[Click here](#) to organise a demo to show you how Kyocera's DMS can optimise your business.

Discover more