



introduction of a document management system

The introduction of a document management system (DMS) is an important step for the purpose of allowing your corporation to advance toward increased digitalization and that of optimizing the handling of data, documents, and important work processes. However, before jumping right into the project, you should take your time to calmly plan the individual measures.

3) overall situation:

After the organizational structure of the project was defined, reviews of the current state already deal with the project contents. A thorough analysis of the initial situation is the basis of deriving, in the subsequent step, all the requirements to be met by the DMS.

Problem description

In order to find a suitable solution, you should initially clarify the actual type of the problem that needs solving. Such problems may consist in paper-based processes that are both time-consuming and error-prone, in archiving requirements that need to be managed, or missed deadlines that can be attributed to nontransparent workflows.

Documents and files

Capture all the documents and the data that you work with at your corporation and that are in any way related to problem you identified in the first step. Classify these problems based on the following:

document type (e.g. invoices, order confirmations, personal documents, etc.);

form of transmission (paper-based or digital transmission);

format (e.g. PDF, Excel, JPG, Word, etc.);

quantity (e.g. 250 employment contracts, 1,000 invoices per month, 150 applications per year);

sources (Are documents created internally or externally? In what ways are they provided to the corporation?);

users (Which departments and employees work with the documents?)

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Excerpt from the checklist:



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Processes

Inefficient processes do not get better by digitizing them. However, digital imaging offers the opportunity of previously putting to the test and optimizing existing workflows. Therefore, you should document existing company processes that are in any way related to the problem to be solved. The following points will help in this regard:

Sketching

Which departments are involved?

Where are possible sources of error?

Evaluation: is there a need for optimization?

Systems

Determination of the data and the documents also relates to the question of which software solutions and systems your corporation uses already. In this regard, the IT department is an important point of contact.

Which systems exist already?

Which interfaces exist?

Getting an overview of the system landscape, data, and processes at a corporation and deriving requirements therefrom for a document management system is a complex challenge. We are happy to support you in this regard.

your checklist for a successful DMS project

All relevant requirements in a compact and clear format—for smooth planning and implementation.

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