



# Document Management Solutions Check-List

## Overview

Regardless of how many documents you have, where they live, or what format they come in, centralizing your organization's records in one secure location should be a top priority. Fortunately, there are numerous document management solutions to help your organization achieve its paperless initiatives. But how do you know which solution is best suited to your current and future document management needs?

This checklist will help you understand and evaluate competing document management systems so you can choose the one that fits you best. This checklist will also come in handy when evaluating different document management solution providers, as it gives you a comprehensive list of questions to ask so you can quickly get the most important information you need to make a decision.

Note that we have created three solution line items so that you can quickly compare solutions and how they stack up for each question.

Keep in mind, the best document management system isn't necessarily the one that "checks all the boxes" but the one that checks all the boxes that are most important to *you*. If you have any questions about the features and capabilities included on this checklist, contact the document management solutions experts at BMI Imaging Systems (800-359-3456).

<b>Capture</b>	<b>Solution 1:</b>	<b>Solution 2:</b>	<b>Solution 3:</b>
Is the product compatible with a wide variety of scanners? Does it support hybrid and specialized capture devices (i.e., microfilm scanners)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the system support advanced scanning functionality, such as scanning additional pages into existing documents, image adjustments, and automatic blank page removal?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can you import, capture, and archive electronic documents (images, text, spreadsheets, PDFs, etc.) in their native file formats and process them as you would scanned documents?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can you extract data from electronic documents—including text, template, and identification data—either manually or by OCR, bar code recognition, or optimal mark recognition?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can extracted data be used for database entry, folder naming, or indexing?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the system include safety and privacy features? For example, can it automatically identify and redact specific data patterns (such as social security numbers or addresses) within the document?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Indexing</b>	<b>Solution 1:</b>	<b>Solution 2:</b>	<b>Solution 3:</b>
Are users able to create separate templates for distinct document types?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are users forced to enter field information in specified formats?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can templates and/or fields be reassigned or updated at any time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the system support dynamic multi-tier fields? For example, “City” values are populated and displayed based on the “State” field chosen.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can you auto populate field information using tokens?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Search and Retrieval</b>	<b>Solution 1:</b>	<b>Solution 2:</b>	<b>Solution 3:</b>
Does the product support and/or feature template field searches?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can you automatically perform commonly-used searches such as full-text, field, and name?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can users perform Boolean searches to narrow results? I.e., can users combine search criteria to find specific results?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can users save search criteria and results for repeated execution, quick reference, and easy access?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the solution feature context display? In other words, can you see how a word or phrase is used without having to retrieve the entire document?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Document Management</b>	<b>Solution 1:</b>	<b>Solution 2:</b>	<b>Solution 3:</b>
Can users rename and reorganize document files and folders for easy access and/or adherence to naming and organization conventions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can documents be previewed within the folder browser?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the software support document sharing and ad hoc workflow processes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can you stamp images with graphics, annotations, or watermarks without modifying the original document?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the solution feature export capabilities? Can users export list contents to a csv file?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the product allow for side-by-side document displaying?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>