

Supporting Your Document Management Software Without an IT Team

Document Management Systems (DMS) are crucial for businesses to efficiently organize, store, and manage their documents. A robust DMS streamlines operations, improves productivity, and ensures regulatory compliance. However, managing a Document Management System can be challenging, especially for businesses without a dedicated IT team.

Without an IT team, businesses might face difficulties with installing, configuring, and maintaining their DMS. Issues such as needed updates, troubleshooting, and user management can become significant hurdles, potentially disrupting daily operations.

Not having a dedicated IT team to manage your DMS shouldn't be a barrier when considering whether or not a DMS is right for your business. It should, however, be a consideration when choosing which DMS is right for you. The right DMS provider will assist with installation and setup, provide team training, and offer ongoing maintenance and support.

Choosing the Right DMS

Choosing a user-friendly DMS is critical for businesses without an IT team. The software should be intuitive and easy to navigate, allowing users of all technical levels to operate it efficiently.

When selecting a DMS, look for features that cater to non-IT users:

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1. **Easy Installation and Setup:** The DMS should offer a simple, guided installation process.
2. **Comprehensive Documentation:** Detailed manuals and help guides can assist users in understanding and utilizing the software effectively.
3. **Automation Features:** Automated workflows minimize the need for manual intervention.
4. **Reliable Customer Support:** Access to knowledgeable customer support is crucial for resolving issues promptly.

DMS System Installation

With the right DMS provider, here's how DMS installation might look without an internal IT team:

1. After signing a contract with your document management software provider, they will provide consultation and guidance into server options to install the software on (if your business doesn't already have prior server infrastructure). Not all DMS options have the capability to run on most if not all server types, however, this discussion is critical to ensure that you're either choosing the correct server type or choosing a DMS that is compatible with your current server.
2. Then, your DMS provider will provide instructions and guide you through preparing your server for DMS installation.
3. Lastly, the DMS provider will offer installation services, and install and set up your business' DMS according to your needs and requirements.

If a DMS provider doesn't offer installation and setup services, they may not be a good fit for a business without a dedicated internal IT team to support this process.

DMS Employee Training

Once your business' DMS installation and setup is complete, training employees how to use the software is critical to software adoption. Training and documentation are especially crucial for teams without an in-house IT team available for support.

Many DMS providers offer some level of one-size-fits-all training on the basic ins and outs of the software. However, the most effective training options will include broken out sessions based on roles within the company and how those individuals will be using the software, and customized walk-throughs of how their new dms solutions solve your unique business problems.

Ongoing Technical Support

Once your business has been onboarded and trained in your document management software, it may feel a bit intimidating to work in a new, robust system. What if something breaks? What if you forget how to do something after training? A good DMS provider will have a robust knowledge base with easy-to-follow instructions for any question that may arise. Additionally, you'll want a provider that has an excellent support team that is easily accessible.

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DMS Champions Within Your Organization

If you don't have an internal IT team, identify and train a few employees to become DMS champions. These individuals can act as internal experts, assisting colleagues and ensuring best practices are followed. These select go-to individuals should be well-versed in all aspects of the software, help train new employees, and act as an internal support team for process assistance. These individuals may even act as the primary points of contact with your DMS provider for things such as adding users or submitting support tickets.

Supporting Your DMS Without an IT Team

Supporting a DMS without an IT team is challenging but feasible with the right strategies. Choose a user-friendly DMS, leverage vendor support, invest in comprehensive training, and create DMS champions within your organization.

Optix by Mindwrap offers an intuitive, user-friendly DMS with a US-based support team that knows Optix and its clients inside and out, making it an ideal choice for businesses without an IT team. Mindwrap offers a fee-based remote Optix Administration Contract which includes but is not limited to routine Optix software maintenance on the server, minor Optix screen modifications and workflow route modifications, and administrative tasks such as adding user accounts and troubleshooting assistance as-needed. Optional add-ons include:

- Customer-Specific Optix Application Support
- Optix Desktop Support
- New Optix User Standard Training
- New Optix User Customer-Specific Training

Additionally, Optix users can utilize the support website for free which includes an extensive knowledge base and access to the support team M-F 8am-8pm via phone, email or support ticket. If your business operates outside of standard business hours, Optix offers additional support hours when needed.

Being without an internal IT team to support your DMS doesn't mean you have to do it alone, Optix by Mindwrap is here to help from installation through the ongoing growth of your business.

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