



# What to consider when selecting and purchasing a Document Management System (DMS)?

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# Introduction

As a document controller, your role is crucial in ensuring that every piece of information is accurately managed, securely stored, and readily accessible. In industries where precision and efficiency are critical, selecting the right Document Management System (DMS) is essential to the success of your projects.

This whitepaper is crafted to provide you with a comprehensive understanding of what to look for when choosing a DMS that meets the demands of complex industries like Renewable Energy, Oil & Gas, and Mining. With over 32 years of experience, Assai has developed document management solutions tailored to address the challenges you face daily - whether it's maintaining version control, ensuring compliance, or coordinating across multiple stakeholders.

Within this whitepaper, you will find:

- **Essential Features:** An in-depth look at the DMS functionalities that directly impact your ability to manage documents effectively, from version tracking to secure access control.
- **Cost and Implementation Considerations:** Detailed insights into the financial and logistical aspects of implementing a DMS, enabling you to plan and budget with confidence.
- **Evaluation and Selection Criteria:** Practical advice on how to evaluate and select a DMS, focusing on the factors that will most significantly affect your operational efficiency.

This whitepaper is designed to equip you with the knowledge needed to make an informed decision that will enhance your document management capabilities and support the successful execution of your projects. Explore how Assai's expertise and solutions can help you achieve greater control and efficiency in your work

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# Benefits of a Document Management System

## Improved efficiency

A document management system (DMS) can improve efficiency and effectiveness by providing a central location for storing and organizing all documents, eliminating the need to search through physical or disorganized digital folders. A DMS can also include advanced search capabilities and collaboration tools to help users find and work on documents more quickly. In addition, a DMS can track and store different versions of a document and automate certain processes, such as routing documents for review and approval, saving time and reducing the risk of errors. Overall, a DMS can streamline document-related processes and significantly improve efficiency and effectiveness for organizations.

## Increased security

The system can increase security by protecting documents from unauthorized access and ensuring that only authorized individuals can view and modify them. A DMS can also track and monitor access to documents, allowing organizations to control access to sensitive information. In addition, a DMS can store documents in a secure, centralized location, reducing the risk of data breaches. Overall, a DMS can help organizations protect sensitive information and ensure compliance with regulatory requirements.

## Reduced paper usage

By using a DMS, organizations can reduce paper usage by storing and accessing documents electronically, rather than printing them out. This not only saves paper, but also helps to streamline processes and make it easier to access and share documents within the organization. Additionally, a DMS can help to reduce the risk of lost or damaged documents, as they are stored securely and can be easily backed up.



## 5 Features to consider

### 1 Version control

One of the key features to consider when purchasing a DMS is the ability to track and manage different versions of documents.

This is important for ensuring that the most up-to-date and accurate versions of documents are being used and for maintaining a record of changes made to a document over time. Some DMS solutions offer features such as document approval workflows, allowing documents to be reviewed and approved by multiple stakeholders before being finalized. Others provide a revision history, allowing users to see and compare different document versions easily.

### 2 Security and access control

A DMS should have robust measures to protect against unauthorized access and data breaches. This may include data encryption, multi-factor authentication, and regular security updates. In addition, a DMS should offer the ability to control user access and permissions on an individual or group basis. This allows organizations to restrict access to sensitive information and ensure that only authorized users can access, view, or edit certain documents.

### 3 Integration with other systems

For many organizations, a DMS is just one part of a larger ecosystem of business software. It's important to consider whether a DMS can integrate seamlessly with other systems, such as digital signature or enterprise resource planning (ERP) platforms. This can help to improve the flow of information and reduce the need for manual data entry or document transfer. A DMS that offers integration with other systems can also facilitate the sharing of documents between different teams and departments, allowing for more efficient collaboration and decision-making.

#### **4 Search and retrieval capabilities**

Another key feature to look for in a DMS is advanced search and retrieval capabilities. This can make it much easier to find and access the documents that your organization needs, saving time and improving productivity. Look for a DMS that offers a range of search options, such as keyword search and metadata search. In addition, a good DMS should allow users to search for and access documents from multiple locations, such as a local server or the cloud.

#### **5 User-friendliness and ease of use**

A system that is intuitive and user-friendly can help to reduce the learning curve for users and encourage adoption of the DMS across the organization. Look for a DMS that offers a clean and intuitive interface, as well as training and support resources to help users get up to speed quickly. A user-friendly DMS can also help to improve productivity and reduce the need for technical support.



# Cost and implementation

## Time and resources required for implementation

Implementing a DMS involves a financial investment and a significant investment of time and resources. This can include configuring the system, migrating documents, and training users. The length of the implementation process can vary based on the complexity of the DMS and the size of your organization. Carefully assess the time and resources required and ensure your organization has the capacity to manage the project successfully.

## Upfront and ongoing costs

The cost of purchasing and implementing a DMS is an important factor. Most DMS solutions require an upfront investment, which may include the cost of the software and any additional hardware or infrastructure. There may also be ongoing costs for support, maintenance, or upgrades. Carefully review the pricing structure of different vendors and understand what is included in the cost.

## Support and maintenance

To keep a DMS running smoothly, it needs ongoing support and maintenance. This may include software updates and technical assistance for users. Carefully evaluate the support and maintenance offerings of different vendors and choose one that meets your organization's needs. This helps ensure the DMS functions well and provides value in the long run.

# Evaluation and selection

To select the right digital management system (DMS) for your organization, consider your organization's specific needs, research and compare potential DMS solutions, and evaluate vendor credibility and customer support. Key factors to consider include desired features, costs, implementation resources, customer support, and ease of use. Thorough evaluation and selection of a DMS that meets your organization's needs and budget can provide real value and support the success of your organization.

## 1 Identifying and prioritizing your organization's needs

Before starting the process of researching and comparing different DMS solutions, it's important to take the time to understand the specific needs and challenges of your organization. This can help to ensure that you choose a DMS that is well-suited to your organization's needs and can provide real value. Some key questions to consider when identifying your organization's needs include:

- What specific challenges or pain points are you looking to address with a DMS?
- What are the key features and capabilities that your organization needs in a DMS?
- What is your budget for purchasing and implementing a DMS?
- How much time and resources are available for implementation and training?
- How important is user-friendliness and ease of use for your organization?

## 2 Researching and comparing potential DMS solutions

Once you have a clear understanding of your organization's needs, you can begin the process of researching and comparing potential DMS solutions. This can involve gathering information on different DMS vendors and their offerings, as well as reading customer reviews and comparing pricing and feature sets. Some key factors to consider when comparing DMS solutions include:

- The range of features and capabilities offered by the DMS
- The upfront and ongoing costs of the DMS
- The time and resources required for implementation
- The level of customer support and technical assistance available
- The user-friendliness and ease of use of the DMS

## 3 Evaluating vendor credibility and customer support

In addition to evaluating the features and cost of different DMS solutions, it's also important to carefully assess the credibility and customer support offerings of potential vendors. This can help to ensure that you choose a vendor that is reputable and can provide the level of support that your organization needs. Some key factors to consider when evaluating vendor credibility and customer support include:

- The vendor's industry certifications and references
- The availability of customer support and technical assistance
- The frequency and availability of updates and upgrades
- The vendor's track record and reputation in the market

## Summary

A well-chosen DMS can have a significant impact on the efficiency and productivity of your organization. By carefully considering the factors discussed in this whitepaper, you can choose a DMS that is well-suited to your organization's needs and provides real value. Some key takeaways to consider when purchasing a DMS include:

- The importance of understanding your organization's needs and priorities when evaluating potential DMS solutions
- The need to carefully compare features, costs, and customer support offerings when choosing a DMS
- The potential benefits of a DMS, such as improved productivity, streamlined processes, and better security and access control
- The importance of carefully evaluating vendor credibility and customer support when choosing a DMS vendor

### Everybody on the same page

## About the author

Arno van Vulpen, with a background in information science and a specialization in user experience, draws inspiration from his scientific roots. Since joining Assai in 2013, Arno has advanced from consultant to product manager, leading innovations in document management software. He has been instrumental in developing Assai Connect, setting new industry standards. Passionate about the role of software in engineering projects, Arno advocates for its early integration to enhance project outcomes. His philosophy emphasizes alignment between project teams and document controllers, ensuring everybody has quick access to crucial information. Arno's journey began on the client side, where he firsthand experienced the challenges Assai could solve, leading him to join the company. He is driven by a desire to improve lives and contribute to a better, safer, and more sustainable world.



## About Assai

Some people say you shouldn't let history dictate the future. At Assai, we see it differently. History is our business. We store activities because they have shaped things as they are now and will be. Take our name: 'Assai' is an adjective in Italian. 'Allegro assai' makes lively music even livelier. Much becomes more. Beautiful becomes magnificent. That's what our document management system brings to your projects and operations: more certainty, reassurance, impact, and control.

Our goal has always been to help clients keep their critical information safe and accessible. Not the slightest piece of information must be forgotten. Since 1996, we have been the trusted partner for those who shape the future. Primary energy companies and construction giants rely on our software, which constantly evolves and adds more value. We offer unmatched flexibility without sacrificing precision.

Whether you're in the oil and gas sector, renewable energy, chemicals, or mining, we ensure that is on the same page so that your projects are executed safely and efficiently and will be remembered for the right reasons. In a world where energy demands are rising, and sustainability is paramount, Assai helps you confidently navigate these challenges.

From building oil rigs to setting up wind farms, we understand that success lies in the details. Our software ensures that every decision is backed by accessible, secure data, making it possible to respond to any situation with certainty. With Assai, companies gain control over their complex projects, their past, and the future, making sure their efforts are not just remembered but 'assai memorable,' achieving more than they thought possible.

Check it out on our site, and feel free to [book a demo!](#)



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