

Finding the right solution to support your needs for content management and process automation can significantly impact your organization's efficiency, collaboration, and information management. However, with numerous options available in the market, it's crucial to approach the buying process with a clear strategy.

To help you make an informed decision, we have compiled a comprehensive buying checklist. This checklist will guide you through the key considerations, features, and functionalities to evaluate when selecting a comprehensive platform that aligns with your unique needs.

ERP INTEGRATION

- Does the solution integrate with your current ERP and other critical software?
- Can information be pulled into forms and then passed back to your ERP or other solutions?
- Can documents be retrieved and/or filed appropriately using ERP information?

MIGRATION

- How many successful migrations have been completed?
- How many migrations have been completed from your current ECM system to this solution?

CONTENT MANAGEMENT

- Does the ECM solution have the ability to control who can view or change particular documents maintained in the content management system?
- How are documents and the associated data captured and filed?
- Can it capture data from print streams and convert them to images for automatic storage within the ECM solution?
- Does the solution have features that will help keep your organization compliant (FERPA, HIPPA, etc.)?

IMPLEMENTATION

- How long does a typical client implementation take?
- What ongoing training and support is offered post implementation?
- What is the provider's track record of migrating customers from legacy ECM systems?
- Does the provider offer conferences or webinars specifically designed for customers?

EASE OF USE

- How would you rate the user experience of the ECM?
- Does it support single sign-on capabilities?
- Does it require extensive user training? Does the ECM provider offer documents/videos for troubleshooting?

MOBILE

- Can an end-user leverage the ECM solution on a mobile device? Can the administrator?
- Can you access the solution natively from the browser on a mobile device without the need to install an app?
- Is there any difference to the end-user when accessing the ECM solution on a mobile device vs. a laptop or computer?

SECURITY

- Does the ECM deliver comprehensive data security and cybersecurity protection?
- How well does the solution protect sensitive information? (Encryption)
- Does it control access to information based on roles and permissions?
- Does the solution support SSO?
- Does it offer field encryption and data masking?

CLOUD ARCHITECTURE

- Is the ECM solution in the cloud?
- Does the solution support on-demand scalability?
- Does the solution have comprehensive disaster recovery capabilities?
- Is the solution's architecture built for the future?

ELECTRONIC FORMS AND WORKFLOW

- How are new forms created in the electronic forms solution?
- Does the ECM solution offer unlimited workflows, electronic signatures, and form submissions?
- Once in its final state with any attachments, can a form be filed into the content management system? Can it update your ERP?