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Document Control Software Tips for Organizations of Any Size

Companies can face many challenges when it comes to managing their mandatory procedures and quality documents, especially when the wrong version is used. The costs can mount quickly, cutting into profits.

/24-7PressRelease/ - NORWICH, CT, April 08, 2008 — Mystic Management Systems, a leading provider of web based document and quality management systems for twenty-five years, understands that document control can be the last thought on the minds of workers. ERP's, CRM's, and accounting software all seem to take precedence. Yet, the use of one wrong specification, work from an outdated set of instructions, and following a non-current policy can cascade into a torrent rush of waste and expense.

The tips below are from the experiences of Mystic Management Systems' clients and the experience of its staff. The tips are designed to aid in a search for a document control software solution for an organization of any size.

- 1.) Software is a choice that is available to help organizations meet their needs. Many providers have solutions that not only keep documents, specifications, and procedures controlled, but the same solutions also help companies meet their regulatory compliance and/or quality organization standards. Basic features should be checking content in/out, revise, review, approve, and archive the information.
- 2.) Companies that operate from multiple locations should consolidate the various procedures, specifications, policies, drawings, and documents into a single repository that can be accessed from anywhere. The software should allow you to access your documents through your intranet or the internet.
- 3.) Companies spend an inordinate amount of time and energy trying to keep many locations and/or departments on the same current sheet. File shares and email create duplications that immediately lead to wasted time, effort, and resources. The software chosen should control how users see and work from the current versions while automatically archiving older content. It is important that for most industries and their regulations that the archived material can be accessed when called upon.
- 4.) Input from the directly affected users and staff should be taken into account when making a decision on the document control software to be used. Assumptions about their needs should not be taken when moving from paper to an electronic document control process. Failure to obtain "buy-in" can result into a delayed rollout and severe pushback. The document control software provider selected should have experience in managing such a dramatic change and brought that to your attention during the initial search.
- 5.) Prior to making a change, analysis should be conducted on the current lifecycle being used by the company. The analysis should help provide an understanding of where current bottlenecks lie, what the costs are to the company, and help all the stakeholders understand the purpose of changing. Education of the parties involved will allow them to see the larger picture and the valuable impact an investment in document control software can bring to the company. The software vendor should have experience in the analysis and align the software with the company's mission and goals.
- 6.) When choosing a document control software package make sure that the automation of the workflow is as good, if not better than what is currently being done. The software should quicken the time for reviews and approvals of policies, procedures, etc. that normally languish in a manual or emailed workflow. The user interface should be easy for managers to go in and conduct the actions required of them in as few steps as possible.
- 7.) The document control software chosen should be able to work flawlessly with your email to send notifications to managers, users, and others when content needs to be reviewed, approved, and read. The software should be configurable to notify when document become current and replace older versions. Notifications should also be configurable when to remind users when their actions required of them are overdue and escalate the delay up the chain of command.

8.) A strong software solution for any company will allow for content based training. This action will help a company ensure that its employees have read and fully understood the nature of the content. This function should be as automatic as the workflow for the content, so that when revisions are made everyone involved can be retrained quickly. The functionality should also allow for new employees to train on current content when hired.

9.) Any system chosen to manage a companies set of procedures, policies, specifications, etc. should have a security model that can be tailored to the roles and teams of individuals working in it. The software chosen should align with the security goals and needs of the company and easily instituted.

10.) It is important for any company looking to invest in a document control solution to understand and know exactly what comes standard and what is extra with the software. Many of the features mentioned above are sold as modules - extra add-ons to the software that quickly increases the price of investment to any company. The focus of any project team when choosing a document control system should be: does the software presented meet and exceed the needs of the company? Is it easy for the lowest level employee to use? Is the software quick to implement? Will the company quickly realize the return on the investment made? Will the software align with the mission and goals of the company? Does the vendor understand the needs of the company? If the project team finds a "no" to any of the above six questions, then it should not recommend the purchase of the software package.

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About Mystic Management Systems, Inc.

Mystic Management Systems, Inc. is a twenty-five year old leading global provider of quality software solutions, including document control software, product lifecycle management, packaging/specification management and corrective and preventative action. Using applications from Mystic Management Systems, companies throughout the world have been improving profits, reducing costs, and producing better quality products since 1983.

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