

CHECKLIST

Before Choosing an Enterprise Document Management System



01



DOCUMENT ORGANIZATION

- Can you find documents quickly using search?
- Does the system support metadata or tagging?
- Is document organization automated or manual?
- Can you maintain a consistent naming structure?

02



ACCESS & SECURITY

- Can you control who can view, edit, or share documents?
- Does it support role-based access control?
- Is there an audit trail to track document activity?
- Are sensitive documents protected properly?

03



WORKFLOW & PROCESS

- Does the system support approval workflows?
- Can documents move automatically between users?
- Does it reduce dependency on email approvals?
- Can you track document status easily?

04



SEARCH & RETRIEVAL

- Can you search documents using keywords?
- Does it support OCR for scanned documents?
- Can you filter results based on metadata?
- Is document retrieval fast and reliable?

05



USABILITY & ADOPTION

- Is the system easy for non-technical users?
- Does it require minimal training?
- Will your team actually use it daily?
- Does it simplify work instead of adding complexity?

06



SCALABILITY & INTEGRATION

- Can the system handle increasing document volume?
- Does it integrate with your current tools (email, CRM, etc.)?
- Can it support multiple departments?
- Is it flexible for future needs?

07



OVERALL FIT

- Does it solve your current document problems?
- Does it reduce manual work?
- Does it improve how your team works?
- Will it still work for you in 2–3 years?