

## Thinking of Attaching Documents to your Line of Business Application? Think Again!

Document management doesn't have to feel like a slapdash, haphazard process. But often due to the sheer volume of work the average employee is tasked with, it's easier to find a rhythm in the chaos vs. taking the time to step back and implement a better system. And that can certainly include the impulse to slap a pdf alongside every line item as a way to feel like you're in control, covering all the bases in case of an internal audit or compliance check.

We feel pretty strongly about changing that mindset. You need to be smart about how you're organizing your records. Let's jump in.

### How to Overwork Your System

The primary purpose of a database is to manage and process data quickly and efficiently. Since data carries a very small footprint, the resulting growth of a database is typically slow and very manageable. However, once you start attaching documents, everything starts to grow exponentially. It doesn't take long for a database to expand into multiple gigabytes or even terabyte territory, which will eventually impact your server performance. At some point you'll need to increase Database RAM and Storage, or possibly require a complete server upgrade overhaul.

With this added burden, it's likely that your Line of Business application's performance will also be degraded, meaning you'll see a drastic increase in the amount time it takes to perform a system backup and recovery of your Line of Business application.

**Here's the bottom line:** if you can't adequately access and back up your databases, your organization is at a significant risk in terms of your disaster recovery strategies.

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## It's Complicated: Document Silos and Data Tracking

By attaching documents to individual Line of Business Applications, you are effectively creating individual silos that are only accessible through the application. This means you're forced to manage individual systems, including creating and maintaining individual system backups, testing, and verification. This reduces your ability to access data as quickly as possible.



And what about version control? Are you looking at "Big Contract v8", when you should be reviewing the most current "Big Contract v9.2"? Things can get messy quickly when you're collaborating on a document with a team. The ultimate software solution has centrally administered and managed document repository that stores every version of every document and shows you when changes were last made — and by whom.

## Unlocking Employee Productivity

Attaching documents to an application is a limited filing solution, and it's typically a time-consuming effort for staff. You can easily unburden employees by finding a document imaging scanning approach that allows direct scanning to the file folder, as well as batch scanning and form recognition scanning, where appropriate.



Implementing workflow alongside this function helps even more, since documents can automatically route to staff for review and approvals right from the system. Additional features like electronic forms and DocuSign make managing all these moving parts a breeze, and frees up employees to focus on the work they do rather than the tedious steps needed to document daily tasks.

## Document Retention and Your Legal Liability

Most attachment features in Line of Business applications do not include the ability to manage future growth and perform document lifecycle management.



This means that your organization is keeping your documents for much longer than legally required. If legal action is taken against you, these documents could be subpoenaed by the courts, leaving your organization at risk. An ideal solution includes the ability to set document retentions and manage future purging, as appropriate per regulatory guidelines. This mitigates your organization's legal risks too, as a document that has been legally purged cannot be recalled in court.

## Plugging Those Security and Audit Holes

When you attach documents to a Line of Business application, the login access provided to the employee for that application is the only true security feature.



This leaves your organization at risk, because there may be certain kinds of documents that a user should be allowed to see, and others that should be viewable only to permission-enabled staff. Open access will allow every user to see every attachment — regardless of how sensitive the material may be. Most attachment features also lack the ability to track access, deletion of documents, and other document functions.

A comprehensive document management system can protect access to the various types of information and provide your organization with a detailed audit trail of who accessed which document — and what they might have done with it.

## Time to Evolve to a New System. You in?

If your organization ever decides to migrate to a new application, the conversion will be significantly more difficult and expensive if you have a ton of attachments scattered throughout your Line of Business application. Rather than a smooth transition, you now have a complicated document conversion project to manage, which takes time, patience, and attention to details. Aside from delaying the implementation and adoption time to getting a new system up and running, the drastically increased workload on IT and/or administrative staff is not to be understated here.



## The Best Things in Life Aren't Free

Even when it's from a world-beloved entity like Google, "free" should be a big red flag. Organizations — especially small companies and nonprofits — are regularly turning Google Docs for their document management system. Yet for reasons of privacy, security, and true document management and retention mandates — Google Docs is not the best answer.



Google doesn't have built-in workflow outlets, so once data is in the system, it's stagnant and difficult to create security features around. Google doesn't have OCR capabilities to make your scanned documents easily searchable, and it won't necessarily integrate with other existing programs.

Then there is the question of the integrity of the data you've stored. Is Google data-mining your files (NPR, 2015)? Have you read all the fine print in that Terms & Conditions contract? Not to mention, Google Docs also experienced a widespread outage in November 2017, leaving many users feeling frustrated and helpless as they couldn't access their files. When is the next outage due — right before that huge client pitch? You need to know that your data is safe, easily retrievable, and accessible from anywhere — even when you're on the go.

## In Short

Your Line of Business applications already do a fantastic job of keeping track of structured data for your business. What a smart document management and workflow automation solution can provide is a way to ensure that your unstructured data is kept secure with the same level of scrutiny, while still being easily accessible to appropriate staff who need it to be available for your Line of Business applications. This eliminates the hazards inherent in a simplistic attachment function in your Line of Business software, helps your staff to be more productive and organized, and ultimately keeps your organization on the pulse of a modern, up-to-technology document management and process workflow solution.

## About Upland Software

Upland Software (Nasdaq: UPLD) is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments; automate document-intensive business processes; and actively engage with their customers, prospects and community via the web and mobile technologies. With more than 4,000 customers and over 450,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day.