



Efficiency at the touch
of a button.

Ten impulses for more efficiency.

A document is a document
is a document ...




How to escape the information avalanche.

Stacks of files in the office, folders in filing cabinets, whole mountains of files in the basement or in archiving rooms rented specifically for the purpose. Stacks of letters and invoices in the mail room, hundreds of e-mails in your inbox, and several different IT systems running – does any of this sound familiar to you?

No wonder – it happens at almost every company. And to make matters worse, almost all that information is business relevant. It has to be sifted, processed, copied, archived, it has to be accessible when needed, and transported to various locations all over the premises – for reviewing, approval or filing.

How can these processes be accelerated and simplified before your employees give up in frustration? Only one way: digitally. For some helpful hints on what to look out for when searching for the right software system to optimize your processes, read the following ...

Ten impulses for more efficiency!



Impulse 1 – Decode the jargon.

Many providers will shower you with abbreviations.
ECM, DMS, SOA, ILM ...

You don't have to know precisely what these mean, but you do have to know whether a software system matches the requirements of your daily processes. Why not simply ask your counterpart for a detailed explanation. That's not a sign of weakness, it's an indicator of justified interest!

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1. To be efficient, any document from any source must be accompanied throughout its life cycle: from scanning and verification (qualified electronic signature), through identifying relevant data (classification), distribution to departments and employees (workflows) and secure filing in a digital archive, to convenient ways of searching and displaying all archived data. All this is covered by the terms **Document Management System (DMS)** or **Information Life Cycle Management (ILM)**, of which DMS is more commonly used.

2. In this context, 'documents' refers to the entirety of information – not just invoices and letters, but also tables, diagrams, e-mails, faxes, graphics, print data and more. A good software solution will enable you to **manage** the **contents** of all information within your **enterprise**, hence the term **Enterprise Content Management (ECM)**.

3. A buzzword often heard in recent years is **Service Oriented Architecture (SOA)**. Contrary to many other terms that are little more than old wine in new skins, SOA represents a significant new technology that makes it possible to develop services and functionalities of all kinds in the form of re-usable modules on a standardized technological platform (known as the Service Bus), like a flexible building block system. And it's even vendor-independent.

So always ask about SOA – you will have taken an important step towards greater efficiency.

Impulse 2 – Demand solutions.



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When you have problems or questions, you don't need thousand-page technical documentations, you need solid solutions. And a provider should offer them.

Initially, don't worry about the number of modules and technical details; instead ask directly whether there is a ready-made solution to your specific problem.

- You want to accelerate and automate procedures in incoming invoice processing? Request a solution for digital **invoice processing**.
- You want to improve the processes in your HR department and switch to electronic personnel files? Request a digital solution for **personnel management**.
- You want support for managing your contracts, never to miss a deadline again, and to have access to all important details anytime at the touch of a button? Then you want a digital solution for **contract management**.

These solutions and more will always be included in the portfolio of trustworthy ECM providers – they deliver competence and experience in the form of solution packages.

At the same time, these packages can also be easily adapted to accommodate your own preferences and requirements, and their standard solutions individually customized.

Impulse 3 – Request evidence.



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You're thinking: 'Providers won't tell me where their weaknesses lie.'? True! But their customers might.

So take a critical look behind the scenes. Ask to see testimonials from previous customer projects.

And don't hesitate to arrange reference visits to the provider's previous customers, giving you as a potential buyer the opportunity to see on-site and first-hand whether your future business partners really know what they're doing, and whether – and especially how – the software works in everyday use.

Impulse 4 – Simplicity is key.



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Have you ever taken a look at the user interface of an ECM system?

You're assailed by endless menus, functionalities, buttons, windows and symbols. If you don't happen to have a degree or have been on a week-long training course, these applications are almost impossible to understand. So always test and review the user interfaces before deciding on a purchase; after all, your employees will have to work with them every day for many years.

Displaying complex functions in a complex manner is simple – displaying complex functions in a simple manner is brilliant. Simply brilliant, so to speak.

Surveys show that approximately 80 percent of users mainly create, edit, file and regularly search for documents. An overly complex interface with unnecessary functionalities only causes confusion or even hostility in users.

Providers should specifically offer adaptable interfaces for various use cases – from occasional to 'power' users.

That's how work really becomes child's play.

Impulse 5 –
Compliance A:
the letter of the law.



only blue protective clothing

A software solution must meet the legal requirements for digital data storage.

What use is the simplest system if it doesn't store data safely or completely, leaving you open to assessments by the tax office?

When it comes to legally compliant tamper-proof archiving, the range of applicable laws and regulations is so enormous that even lawyers are lost without the aid of weighty legal tomes.

What ultimately matters isn't what exactly each clause requires, but rather that a provider is capable of meeting these requirements. And that's exactly what you should be looking out for.

Impulse 6 –
Compliance B:
ensure availability.

If archiving were the only issue, you could simply burn your data to a CD and lock it in a safe. But whether that would fulfill the legal stipulations on storage periods is debatable.

After all, on average, data on self-burned disks remains readable for only ten years – making them entirely unsuitable for long-term data storage, according to experts.

ECM providers therefore have to include suitable hardware in the form of currently appropriate, reputable storage systems with their products – and develop the required interfaces, certified by independent auditors, themselves.

There is no other way to individually create a holistic hard- and software concept for tamper-proof and long-term available archiving. After all, data may have to be securely stored and kept available for extremely long periods, e.g.:

- Under civil law: at least 10 and up to 30 years
- E-mails which constitute business letters: 6 years
- In the health sector: up to 30 years (for radiotherapy)
- For architects or engineers: up to 30 years

Impulse 7 –

Optimize e-mail management.



Nowadays, e-mails contain more than just news of unexpected inheritances or incredible special offers – increasingly they constitute business-relevant documents.

Contracts, manuscripts, documentation, blueprints and important image files can be hidden away in the tenth 'Re: RE: Re: Re: RE: Contract offer' e-mail. But there is an answer!

An ECM system must provide an efficient and practicable solution for e-mail management as a whole, ensuring that e-mails and attachments can be saved to the digital archive automatically or at the touch of a button, and are thus available at any time together with all the other documents. This avoids endless copies with identical content and reduces the load on the e-mail-server, because all data is stored centrally in the archive – and is nonetheless easily accessible in users' e-mail inboxes, simply as a space-saving link!

If the system is then also capable of archiving e-mails in a manner that complies with legal requirements pertaining to digital data, that's already half the battle won!

Impulse 8 – Format for the future.



If information is to remain accessible in the long term, it must be archived in file formats that are considered 'long-term available'.

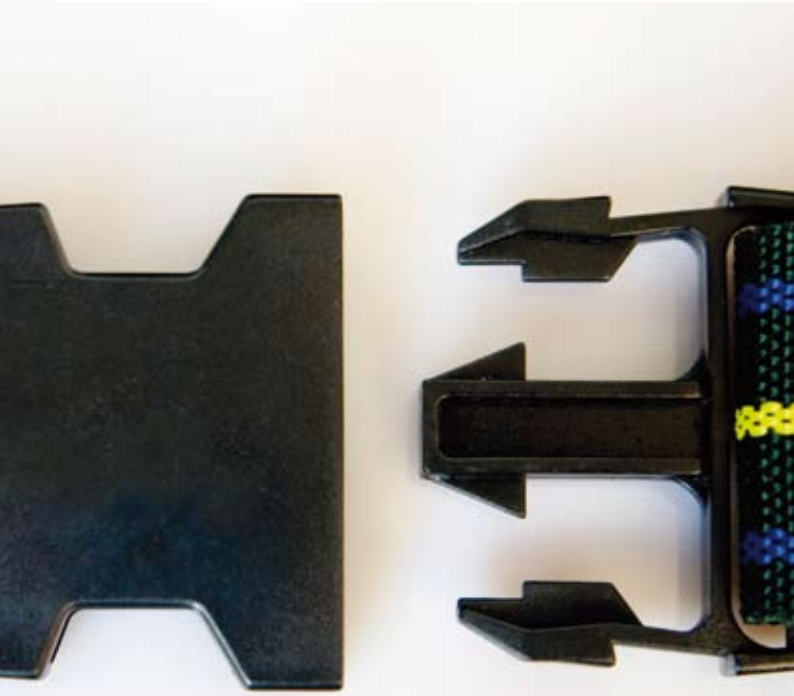
What use, for example, is an archived AutoCAD drawing if it can only be opened using the original program? Will that still be installed on the computer in 30 years? Will the software even still exist then? That doesn't really have much to do with easy searching or meeting legal data storage requirements.

That's why digital information shouldn't be archived in its original format only, but also converted and archived by the system in TIFF, PDF or the PDF/A format: the ISO standard recommended for long-term archiving of electronic documents.

This is the only way to ensure that information remains fully readable even decades from now.

Impulse 9 –

Whoe'er would form eternal bonds.



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An ECM system lives, grows and develops with your company.

When processes or internal structures change, all that is also reflected in the software. It's not a case of unpack, install, done! Ultimately, you are entering into a long-term partnership when you choose a system. A bond with the provider, or rather its employees. The chemistry has to be right.

So there are a few points that you should definitely take into account beyond purely technical and industry-specific aspects:

- The size and experience of a provider
- The reliability and respectability of a provider
- The presence of the provider and its partners on the market
- The sites, branch offices and availability of contact persons
- The personal impression you have gained from speaking with project managers, directors and sales staff
- The service and support options

Impulse 10 –

ECM starts long before software.



If you are looking for an ECM system, first take a good look at yourself.

How are which processes currently handled by whom? And what would be necessary to optimize these processes – or to even start **thinking in processes at all?**

BPM is the buzzword that describes the basis for more efficiency in business processes – it stands for Business Process Management. And it starts long before any software is actually installed, with an analysis of the current processes.

Ideally, you perform the analysis of your systems together with your ECM systems provider – if they have experience of BPM. Only a provider who has understood your processes can competently advise you and ultimately implement functional solutions that really deliver exactly what you previously analyzed and agreed.

So work **together** to analyze and model

- the current process as a later basis for comparison
- a target process that represents significant progress
- the necessary information for implementing the process (allocation of tasks, interfaces, regulations)
- the indicators that are most relevant to this process and will later allow conclusions to be drawn regarding the success of the measures

And then when it comes to the technical implementation, you can sit back and relax, because good planning is the key to success – and to more efficiency. **Simply follow these impulses!**

Now what?

Just put this booklet in your pocket, take a quick look at it from time to time, and most importantly **don't let anyone pull the wool over your eyes!**

Simply follow these impulses, and efficiency will automatically follow.

Want even more impulses?
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