

**ECM WHITE PAPER**

How to digitise your business processes

## Introduction

The author Victor Hugo knew that “nothing is more powerful than an idea whose time has come”, The time for digitised business processes has now come. More than half of IT budgets will be used to speed up internal processes in the coming years, the consultancy firm IDC predicts. Digital workflows “are becoming more and more critical to success”, it states in its “Guide to Digital Working”.

Digitise or disappear: there is no way of avoiding digital business processes. This is because they are more efficient, because they avoid mistakes and because business partners are switching to them as well. Anybody who continues to rely on paper will look outdated - and for good reason.

Companies and organisations are reluctant to abandon tried and tested processes for equally good reasons. They fear resistance from staff and chaos during the transition. Above all, they don't know what to expect when they commit to an enterprise content management system, or ECM for short.

This white paper aims to overcome these reservations. We will explain clearly and concisely how you can digitise business processes simply and efficiently. All you have to do is take the first step, and the rest will follow. Consider this white paper as an encouragement!

We hope you enjoy reading it.

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## 1

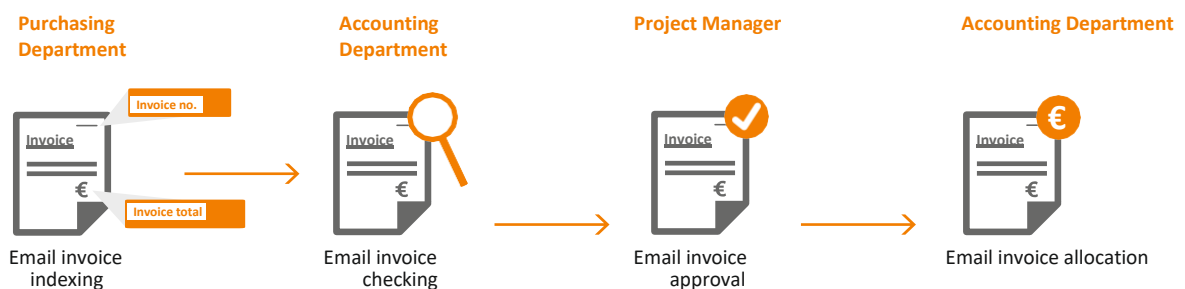
## Why digital processes, why ECM?

Digital business processes make day-to-day work easier. They ensure that documents can be found exactly where they belong. They replace searching with finding, which makes a huge difference.

A survey conducted by Kyocera and Statista found that employees waste up to two hours a day searching for information. Perhaps because the invoice is on a colleague's desk, the personnel file is in the wrong place or a colleague “promised” to take care of updating the contract as soon as they get back from their holiday. Until then, though: **sweet nothing.**

ECM systems can prevent this standstill. The abbreviation stands for Enterprise Content Management and these systems focus on capturing, managing, storing, maintaining and distributing documents in digital form. At the same time, electronic workflows are defined in ECM systems which, for example, route invoices through the system in as automated a manner as desired. This might work as follows:

1. An invoice arrives by email.
2. The invoice is indexed automatically and the workflow is initiated.
3. The Accounting Department receives the invoice, checks it and approves it.
4. The invoice automatically goes to the responsible Project Manager, who approves it.
5. The approved invoice goes back to the Accounting Department and is assigned to an account.
6. The invoice is archived simultaneously and in accordance with the law.





The ECM therefore automatically pushes the invoice step by step through this workflow. Only those with authorisation can view and process the invoice at the relevant step in the process. From the outside, it is possible to see and check at any time which step a particular invoice is currently at. This provides transparency.

It guarantees efficiency too: according to the Bitkom study “Digital Office in SMEs 2019”, 94% of SMEs that use an ECM solution for their office and administrative processes reported a considerable increase in efficiency when accessing information.

**“An ECM system provides the ideal platform for all employees to work together with the best level of information.”**

Thomas Neubecker, Product Manager ECM at TA Triumph-Adler

## ECM: the advantages at a glance

- Internal processes are standardised and organised, resulting in significantly shorter processing times and greater **efficiency**.
- Corporate knowledge is given structure. This facilitates **transparent communication**, internally and with customers as well as suppliers and other business partners.
- Using ECM increases **competitiveness** and ensures the **future viability** of a company.
- ECM systems are **configured on an individual basis** according to the specifications, preferences and requirements of the respective user.
- Documents are **processed and stored in accordance with the law** and in compliance with the GDPR.

**A note on the last point:** no system in the world is automatically audit-compliant and GDPR-ready, it can only fulfil the prerequisites for this. You have to set up the workflows yourself in order to meet the compliance regulations.

# 2.

## What type of ECM system do you need?

There is no off-the-shelf ECM system, and that is by design. Every ECM is tailored precisely to the needs of your company, your organisation. A good ECM system fits like a bespoke suit.

However, there is an off-the-shelf entry point into electronic business processes. Document management systems (DMS) are ideal as a trial run - and for overcoming reservations.

### What can document management do?

All documents are captured and stored electronically. When it comes to archiving, companies and organisations must comply with a number of legal requirements (such as immutability, completeness and traceability). A DMS is primarily responsible for archiving documents in an audit-compliant manner. Authorised employees have access to and can process the documents. Standardised workflows and processes for handling these documents are specified.

### What can enterprise content management do?

Every ECM system depends on the contents of the document management. ECM solutions go two decisive steps further by automating workflows and tailoring them to individual needs and preferences.

There are two types of ECM systems: some solutions are based on standardised modules that are tailored to the needs of the respective client. As a rule of thumb, they are 80% standardised, 20% customised. The alternative is more complex (and correspondingly more expensive): an ECM system that is 100% customised.

Many small and medium-sized companies opt for a DMS solution on a permanent basis. For them, the audit-compliant archiving is the decisive factor, and they perceive the standardised workflows as a bonus.

Larger companies usually go directly to an ECM solution that, along with the workflows, is configured precisely to their needs and preferences based on their own specifications.

ECM solutions can also access content in existing ERP systems. ERP stands for enterprise resource planning. This is used to control internal company procedures and business processes, for example in production, sales, procurement, human resources and controlling. ERP systems, for example those provided by SAP, are widely used as standard in larger companies today. This makes it all the better that ERP data records can easily be integrated into ECM systems.

78%

of companies using ECM software have improved their data quality and information security when handling documents, according to the Bitkom study “Digital Office in SMEs 2019”.



# 3.

## What do you need to pay attention to prior to choosing a system?

It is theoretically possible to convert all business processes entirely to ECM workflows in one stroke. In practice, this is done step by step, one department at a time. There are good reasons for this.

The processes need to be as efficient and convenient as possible. This has to be agreed in advance with the users - i.e. the employees who will later work with the system. This consultation should be taken seriously, if only because it will increase immensely the degree of acceptance of the new system later on. In addition, this early phase shows the extent to which the ECM solution will actually prove to be the promised “make a wish” solution that can really be tailored precisely to the stated needs.

Companies usually start with a **pilot project** within a department to get a feel for what an ECM system can do. This allows valid and sustainable results to be achieved within a manageable scope; it also makes it possible to find out at an early stage which procedural steps have turned out to be successful. This can be built upon later, because ECM systems have a modular structure.

Companies and organisations can select individual modules to start with and then add further modules - in certain business areas or departments - little by little until everything runs smoothly.

Most of the time, they start in finance and **accounting** departments. There are two good reasons for this: Based on our experience, employees are very open to the new processes and the processes themselves do not differ too much from one company to the next. The complexity of the system is accordingly manageable.

Other departments that are a good place to start include Sales, Purchasing and **Human Resources**. The experience gained in pilot projects is extremely helpful when it comes to digitising processes in other departments. Another advantage is that the findings from the pilot projects ensure that very few sceptical voices remain. Word of the advantages is already spreading.

Nevertheless, any **reservations** should never be taken lightly: the more open your employees are to the idea of ECM, the faster the new processes will work. This is why they should be involved as early in the process and as intensively as possible.

Your employees will work with the system on a daily basis. If they see the processes as logical and convenient, nothing stands in the way of success.

Acceptance among your employees must be taken into account when making decisions about **investments in ECM**. The costs of purchasing and operating the system must not be the only subject of debate. Nor is it enough to discuss technical aspects such as how well it can be integrated into the existing software landscape or how adaptable it is. How the ECM functions is at least as important for the users. In other words, is it easy to operate and do the processes flow logically from one to the next?

The **extent of the costs** for a running ECM system depends on the operating model. 46% operate the system in their own company ("on premises"), while almost as many outsource parts of their ECM infrastructure to an external data centre ("private cloud"). The "public cloud", on the other hand, still plays a less significant role, being used by 11% of companies on average according to the Bitkom study "Digital Office in SMEs 2019". It is possible to pay for cloud solutions based on usage, but the classic licence purchase is still the dominant option, partly financed by leasing.

Further costs arise when **purchasing** (licence costs), **implementing** (consulting, installation, programming, training, etc.) and **operating** the ECM infrastructure (e.g. administration, support, updates). **Licensing and maintenance costs** are usually closely linked to the number of users of an ECM system. The study "Digital Office in SMEs 2019" conducted by the digital association Bitkom indicates an average price of €683 per ECM workstation for the classic licence purchase model (see table). The average cost of implementation services is €720 per ECM workstation, with a range of between €150 and €1,565.

## Costs of purchasing and operating an ECM workstation

Figures in euros (adjusted for extreme values) in 2019	Total	20 to 499 employees	500 employees or more
Roll-out costs	720	793	446
Modifications & system maintenance per annum	120	123	110
Licence costs	683	714	553
Usage fee per annum	*	*	*
Maintenance costs per annum	116	116	118

\* No data due to too few cases  
 Source: Bitkom Research (Bitkom study "Digital Office in SMEs 2019", p. 34)

The average annual maintenance fee per ECM workstation is €116. To this must be added an average of another €120 per ECM workstation for modifications to the ECM application during ongoing operation or support services that are not covered by the software's maintenance contract.

# 4

Tailored solutions

## Why digital processes, why ECM??

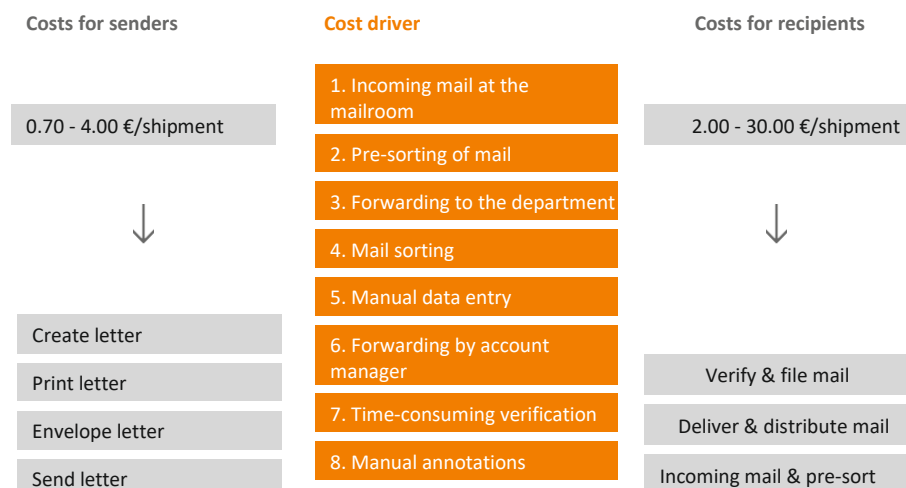
ECM systems have been deliberately designed to be modular. Companies and organisations can select individual modules to start with and then add further modules - in certain business areas or departments - little by little until everything runs smoothly.

In this section we will present various possibilities for making the most of the modular design of ECM systems. You are free to start with one option or combine them depending on your needs.

### 4.1 Digital invoice checking and processing

The ideal entry point to an ECM system is invoice checking and processing. The ECM recognises payment deadlines and discounts and reminds you of both in good time. Routing invoices through the company in digital form with a specified workflow will noticeably speed up processes for checking, approval and payment and reduce costs too. The experts at Optimal Systems have compiled a table detailing the costs of manual invoice processing for both senders and recipients:

#### Costs of manual invoice processing for senders and recipients



Source: "Electronic Invoice Management" white paper, Optimal Systems

The experts at Optimal Systems have calculated that up to 80% of these costs can be saved by switching to electronic invoice processing. These savings can be even greater because digital processes also reduce the error rate. Here is a summary of all the advantages:

- **Greater transparency and speed** along the entire invoicing process
- **More speed thanks to automated methods** of checking, approving and paying invoices
- **Compliance with legal and business requirements** in accordance with the principles of proper accounting (GoBD)
- **Audit-compliant archiving** ensures clarity and avoids filling metres of file folders with invoices. Any alterations made to the documents must remain traceable and fully recorded.

**“No company can avoid digitised invoicing processes any longer.”**

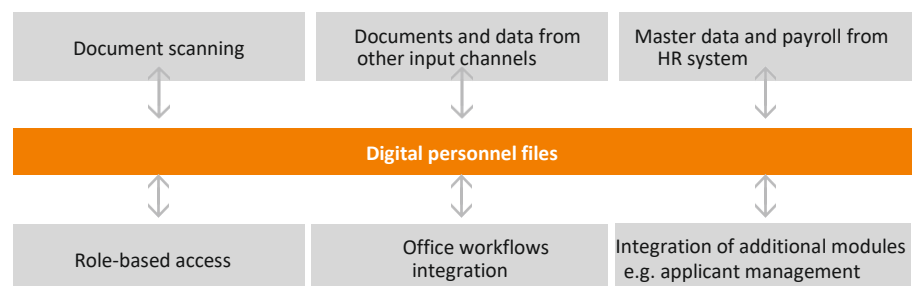
Stefan Halupka, National Sales Director – Content Services at TA Triumph-Adler

## 4.2 Digital personnel files

The focus in human resources management should be on people; there are electronic solutions for every administrative task. For example, digital personnel files can collect the master data of every employee and bundle all the relevant information in a central digital storage location.

Digital personnel files give users direct access to employees' references, certificates or target agreements at the click of a mouse. In addition, the tool provides an overview of employment contracts, holiday provisions, notice periods and salaries. You can also access an overview of the status of job interviews, parental leave or the requirements for job advertisements just as quickly.

### Functions and capabilities of digital personnel files



TA Triumph-Adler's digital personnel files offer, for example:

- Central document management with customised register structure
- Template and deadline management, flexible reporting and integrated full text search
- Subscriptions, follow-ups and favourites
- Mandatory document monitoring (e.g. employment contract)
- Analyses and searches (hit lists) and/or export (e.g. Excel)

Finding things quickly already increases efficiency, but the digital personnel file can do even more. It can be customised further at any time and can be flexibly combined with other solutions, such as digital applicant management.



### 4.3 Digital Applicant Management

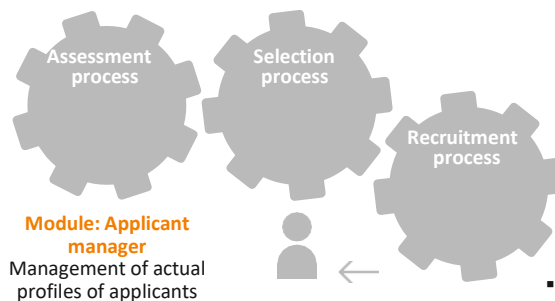
Finding and retaining qualified employees is currently one of the biggest challenges for all employers. There is often a long and arduous road before a position can be filled successfully. Job requirements must be defined and incoming applications assessed, and an internal shortlist must then be drawn up and agreed upon. The applicant management module, installed as an expansion of the digital personnel file, can help with this.

What's more, Using the e-recruiting expansion to the applicant management module enables you either to communicate vacant positions directly via your own website or use commercial career portals.

### Functions and capabilities of digital applicant management

**Module: Job manager**  
Management of target profiles for vacant positions

**Module: Matching**  
Comparison of target/actual profiles (vacancy assignment)



**Module: Applicant manager**  
Management of actual profiles of applicants

**Module: Workflow**

- Assessment process
- Selection/decision process
- End of workflow: **Rejection or signing of the contract**

Digital applicant management supports the entire process from posting the advertisement to signing the contract. The digital applicant management module from TA Triumph-Adler includes these practical features:

- **Qualification list:** Individual, structured identification of required hard and soft skills
- **Job manager:** Easy creation of target profiles based on the qualifications list
- **Applicant manager:** structured filing of candidate profiles (actual profiles)
- **Matching** automatic comparison of target and actual profiles
- **Workflow support**, e.g. with template management and mail merge feature
- **Workflow functions**, e.g. with deadline monitoring and absence management
- **Applicant cockpit:** evaluation of all data and export options
- **Integration of various input channels** (e.g. email, post or portals)

What if an applicant does not suit the advertised position, but their profile sounds interesting? In this case, a message is automatically generated for the applicant asking whether they would like to be added to the internal talent pool. In turn, digital applicant management ensures that users can keep track of this pool.

#### 4.4 Digital project files

There is no such thing as “business as usual” any more. Markets, technologies and the needs and desires of customers are changing too quickly. Companies have to prepare for this, which is why the number of projects is growing. Businesses must fine-tune dozens, hundreds or thousands of processes to make themselves fit for the future. Some of these projects are relatively small, others involve several departments. This makes it difficult to manage them - and to document them. Digital project files can help with this. Here are some of the benefits they bring:

- **Documentation and monitoring** of complex projects
- **Process enhancements** and company-wide access accelerate the pace of projects, resulting in significant **cost savings**
- **More transparency** in project processes and greater legal certainty
- **Reduced strain on IT systems** through outsourcing

## 4.5 Digital contract management

Contracts are created, managed and updated every day in companies, public authorities and organisations in general. It is important to have direct access, otherwise a withdrawal deadline or a time window for a discount might expire. When contracts are managed digitally, the ECM system issues a notification when a deadline is about to expire or an important deadline is approaching. Digital contract management therefore helps to avert financial losses. Here is a summary of some of the advantages of digital contract management:

- **Huge time savings** in creating, managing, amending and searching for contracts
- **Better overview** of contract processes (e.g. for customer, maintenance or rental contracts)
- **Cost advantages** owing to optimised use of quotas and conditions
- **Planning security** thanks to timely start of renegotiations in the event of an expiring contract
- **Fewer errors** thanks to standardised contract templates
- **Compliance** with internal and legal regulations

## 4.6 Digital supplier files

A lot of important information comes together in the Purchasing Department. Digital supplier files allow you to review all supplier and order transactions at a glance and make your entire purchasing processes much more efficient. Here is a summary of all the advantages:

- **Direct access** to all information in one central location
- **Archived correspondence** with suppliers
- **Better rates** thanks to the company's immaculate payment record
- **No more supply bottlenecks** as a result of faster reactions to market requirements

## 4.7 Digital vehicle files

Digital vehicle records make it much easier for companies and other organisations to manage their fleet. There is more to it than just monitoring your company's fleet and the condition of its vehicles. Comprehensive fleet management also involves maintaining business relationships with suppliers and partners. Digital vehicle files ensure that the most up-to-date version of all information on repairs, leasing periods or insurance conditions is accessible at all times.

Digital vehicle files offer:

- **Overview:** All the information for each vehicle is available in one place.
- **Connections:** Interfaces ensure a direct connection to best practices.
- **Electronic scheduling and order processing:** All processes are transparent and can therefore be monitored and followed.

## 4.8 Other digital processes

The seven fields presented here by no means cover all the options provided by ECM systems. We would like briefly to introduce three others here:

- **Purchasing and procurement:** Each order is assigned a status: paid, delivered, completed or complaint. It goes without saying that there is an overview of all open or disputed orders. Similar solutions are also available for Sales and Distribution departments.
- **Healthcare files:** TA Triumph-Adler has developed a digital healthcare file to relieve the burden on nursing staff, and particularly those in the long-term care sector. The DMS solution with standardised workflows allows users to view all relevant patient data with a high level of data security.
- **Digital email archive:** Billions of pieces of information are sent around the globe by email every day. This intellectual capital must be stored and maintained properly in accordance with compliance guidelines. Intellectual property infringements have been considered a criminal offence since 2015. Emails must also be kept as business correspondence and archived electronically. With solutions such as TA Business Optimizer Mail from TA Triumph-Adler, you can guarantee security in two crucial respects:
  - **Legal compliance:** You can protect yourself against data manipulation and comply with retention periods in a legally compliant manner.
  - **Audit compliance:** You can track exactly when and by whom an email was sent or received at any time.

# 5.

ECM in 3 steps

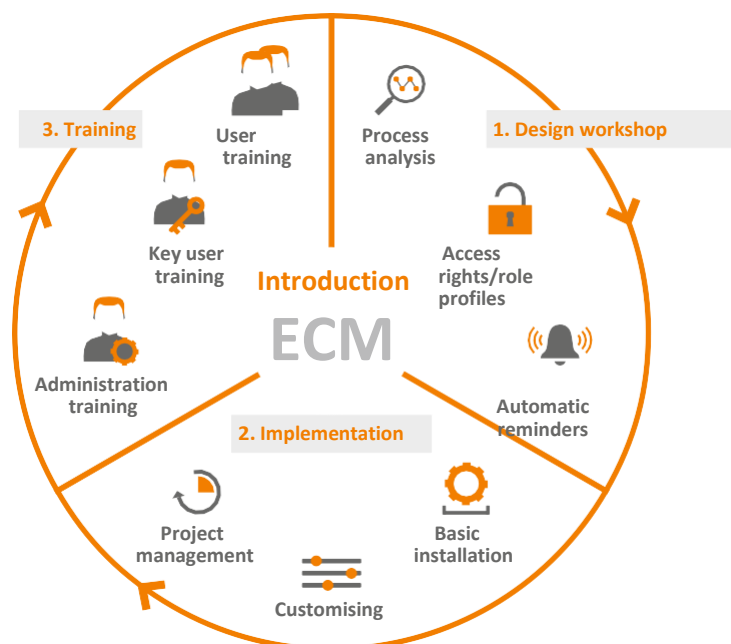
## Design workshop, implementation, training

Day-to-day business must not suffer because an ECM system is being rolled out. Is that even possible? Fortunately, the answer is yes if you stick to this three-step process.



### 5.1 Step 1: the design workshop

What do we need? And how do we need it? Many companies formulate the somewhat vague goal of utilising “efficient processes”. Over the course of a two- to three-day workshop, companies work with their provider to analyse what their ECM system should be able to do in order to meet their specific requirements. The workshops have a technical side and a human side. The technical aspect entails conducting a detailed examination of the existing processes. This usually leads to the identification of starting points for leaner processes. In parallel with this, users - i.e. your employees - tell you what works well and what does not work so well in the current processes. They are also asked to describe what optimal processes would look like for them.



The more precise the analysis, the better the individual solutions will be. That is why the management and your IT specialists play an important role in the design workshop. Discussions are held with them about the overall parameters (costs and timing) and about access rights (who is allowed to access what and when?). Based on the findings from the workshop, the ECM provider draws up a detailed and tailored design, which forms the basis for the ensuing implementation. Once the design has been approved, the next step is to install the ECM solution.

#### Here's why the design workshop will take your ECM project further:

- You can play an active role in designing your ECM solution to suit your needs
- Specific requirements and goals are defined and recorded transparently in a “specification sheet”
- A project plan shows the details of when particular functional blocks will be introduced and what you need to provide through your IT environment so that the ECM can be installed
- Mock-ups show what the ECM solution will look like and give you a good impression of how the user interface will appear

## 5.2 Step 2: implementation

To start with, the ECM provider creates databases. Once the system is up and running after the base installation, the software is adapted (customising). Pre-defined software structures and individual masks (for example for entering invoices) are created. Customising takes the most time, as the appropriate system workflows have to be configured for the individual work processes.

In order to ensure that the ECM is successfully integrated into other systems, the ECM provider talks to the relevant third-party providers as early as the analysis stage, for example if the company uses an ERP (Enterprise Resource Planning) system that is intended to work in conjunction with the ECM system.

Depending on the complexity, the implementation phase may take a few days or several weeks. Usual processes can continue unchanged during this phase so that day-to-day business is not affected. The new ECM solution starts up in the background and is tested extensively. Only once it is ready for everyday use will it be adopted step by step in day-to-day business - and of course only when all users have been trained to be proficient in the new processes. That is exactly what **Step 3** takes care of.



### 5.3 Step 3: training

The prospective users are trained as soon as the ECM has been implemented at the latest and all the processes are up and running. These sessions go into varying degrees of detail.

During **administration training**, administrators learn how the system works and is constructed. Administrators are responsible for managing and maintaining the IT infrastructure and assigning user rights, for example.

**Key user training** introduces the team leaders in the company to the ECM. These sessions are also quite broad, because in practice it has proven useful for larger companies if key users train the users as part of the next step.

**User training** is about what we call the end users. These are the employees who will work with the ECM on a daily basis. It is not only a matter of training them, but also of getting them enthusiastic about the new system.

#### Here's how you can ensure that your employees enjoy working with the new ECM:

- Communicate the tangible benefits, for instance the more convenient processes and time savings
- Show how easy the ECM is to use
- Demonstrate a positive attitude towards the ECM
- Take time for questions, suggested improvements and feedback

How many employees need to be trained and how intensively depends on the size of the company: in smaller to medium-sized companies, every single employee who will work with the ECM system should be trained. In companies with 500 or more employees, only the key users and administrators should be trained, who will then train the end users.

# 6.

In conclusion

## An awakening

Digitised business processes are the new norm. This is why there is no way around digital archiving, digital document management and enterprise content management (ECM). Electronic processes are faster and more convenient, save costs and avoid errors. In this white paper, we have taken the opportunity to introduce you to the advantages and potential applications of ECM systems, and hopefully allay any concerns you may have in the process.

Like every journey, this one begins by taking the first step. Now is the time to embark on it. We hope you have a great journey!

### **Would you like to find out more?**

Then please feel free to contact us at: [talking-future@triumph-adler.de](mailto:talking-future@triumph-adler.de).



## About TA Triumph-Adler

TA Triumph-Adler is your guide to entering the world of the digital office. We can provide you

with everything you need for the workplace of the future in a one-stop solution. We develop and deliver end-to-end managed document services that cover the entire document handling process in a networked and mobile office.

Having a dependable partner at your side allows you to tackle your transition to digital processes more courageously and successfully. TA Triumph-Adler is that partner.

Triumph and Adler have been familiar and illustrious names in offices since the 19th century. Formerly known mainly for typewriters, we are now prominent in the printers and copiers market. These days, we prefer to talk about MFPs, or multifunction printers, because our devices have long since been digitally upgraded with a wide range of optional extras.

Handling documents has been our core business for over 120 years, and we are now bringing this expertise into the digital era. We act as your go-to partner when it comes to archiving, managing and editing documents in digital form. Our services range from an entry-level archiving solution to a customised ECM system. If you want something more, just get in touch with us and we will deliver it!

That way you can concentrate on your core business.

## TA Triumph-Adler's packages

### Digital document management

Fast and transparent processes for capturing, managing, storing and delivering are critical when dealing with digital documents. TA Business Optimiser offers a straightforward access point into digital business processes. This system allows data to be stored in one central location and accessed from anywhere. This means that all documents are digitally archived. TA Business Optimiser can do even more: it enables documents to be processed automatically in defined workflows. TA Business Optimiser is a server software solution that users access via a software client. This makes working with contracts, personnel, customer and supplier files much more efficient.

### Enterprise content management

ECM systems take document management to a new level by aligning processes with individual needs and preferences. TA Triumph-Adler offers two possible approaches:

- we implement ECM systems that are based on standardised modules. This is the foundation on which workflows and business processes are tailored, but only where there is a need to do so.
- Alternatively, all modules can be configured individually and customised for the ECM system.

All our ECM systems are modular, which means that the number of customised solutions can be extended to other departments (such as for invoice, personnel or contract management) at any time if required.

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