ENTERPRISE CONTENT MANAGEMENT

All The Trimmings
None Of The Complexity

ECM

M-Files®
## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIGH-VALUE ECM STARTS WITH THE RIGHT FOUNDATIONS, INCLUDING A SYSTEM THAT MINIMIZES COMPLEXITY</td>
<td>3</td>
</tr>
<tr>
<td>MOVING FORWARD WITH AN ECM DEPLOYMENT THAT EMPLOYEES WILL ACCEPT – AND EVEN EMBRACE</td>
<td>6</td>
</tr>
<tr>
<td>WORKFLOW AUTOMATION FOR OPTIMIZED BUSINESS PROCESS MANAGEMENT (BPM)</td>
<td>9</td>
</tr>
<tr>
<td>ENTERPRISE CONTENT MANAGEMENT AS A PROJECT MANAGEMENT TOOL</td>
<td>12</td>
</tr>
</tbody>
</table>
Ask a group of business executives about the top-three drivers for enterprise content management (ECM) software deployments, and cost reductions will often top the list.

Cost reductions can only be accurately assessed, however, by considering ease of deployment and the end-user adoption rates. If an enterprise lacks the required IT staff resources required to deploy and manage the solution, or if employees cannot see how the ECM system benefits them, the solution will most likely be deemed a failure.

Many ECM solutions are cumbersome and complex, and the time and costs associated with deploying them can be inhibitive. As business users have demanded solutions that are easier to use, less-complex alternatives emerged.
Even so, many ECM solutions still require lengthy and therefore expensive deployments. Significant IT resources must be dedicated to the implementation process, end users have to be trained, and business procedures often must be adjusted to accommodate the scheme of the ECM solution.

Fortunately, there are enterprise content management solutions available that feature the robust set of capabilities required to address the most demanding business requirements, while also providing a simple and easy-to-use interface for end users.

Organizations of all sizes can take advantage of a best-in-class ECM solution with user-friendly characteristics that include:

**Scalability.**

An easy-to-deploy and easy-to-use ECM system can be introduced in a matter of days, not months. Businesses can “test the waters” by launching their ECM initiative within a single department or by automating one or two mission-critical business processes, and then expanding the solution over time.

**Easy Integration.**

Enterprise content management solutions should not only be easy to use, but also easy to integrate with existing business systems so that content can be “live” and accessible across all applications used by employees.

**Configurable.**

A flexible architecture makes it possible to adapt an ECM solution to accommodate unique business and/or industry-specific needs. Secure. Integration with Active Directory and configurable permissions enable businesses to control access to confidential or sensitive information.
For end users, an effective ECM solution offers:

**SHORT LEARNING CURVES.**
Familiar Windows interfaces allow users to work the way they want, with easy access to files and documents and simple drag-and-drop functions.

**PRODUCTIVITY BOOSTERS.**
Finding the right information should be instantaneous for end users. And organizing files should not require complicated folder structures or result in duplicate files within the ECM system. The enterprise content management solution should also facilitate collaboration among groups and project teams, both inside and outside of the organization.

**LOCATION INDEPENDENCE.**
To appeal to today’s mobile workforces, many ECM solutions offer anywhere access to information from smart devices. Mobile access capabilities should meet user expectations in terms of performance and overall capabilities.

**HOW CAN YOU TRULY EVALUATE EASE OF USE AND DEPLOYMENT PRIOR TO MAKING A PURCHASE DECISION?**
Conduct pilot tests and proof of concept exercises via free trials. If you find that an ECM solution evaluation is taking up too much of your time, consider this a red flag and cross the product off of your list of alternatives.
Not all enterprise content management (ECM) platforms are easy for employees to use or straightforward for IT to deploy. While IT can usually overcome the implementation challenges, employees are often left to lament about steep learning curves and negative impacts on their productivity. In the worst cases, complex and cumbersome information management solutions become shelfware or tools that users circumvent.

The good news is that there are ECM solutions on the market that are both easy-to-deploy and easy-to-use. The May 2014 posting, “High-value ECM starts with the right foundations, including a system that minimizes complexity,” lists suggestions for selecting a platform that can break down the barriers to user adoption.
To achieve the highest possible user adoption rate, an ECM deployment must also initially target the right use case. It must be a good fit with the specific needs and requirements of the business as well as the employees’ work styles. As explained in Forrester Research’s report, “User Needs Drive a Solid ECM Business Case,” the up-front considerations should include “aligning user needs with technology capabilities.”

Matching technology to the user needs sounds like common sense. However, historically, the majority of information management deployments were motivated by compliance requirements. According to the cited Forrester report, this trend is shifting during recent years, with more enterprise content management initiatives now aimed at improving productivity. Success in improving organizational productivity depends on accurately assessing and taking into account the end user’s perspective.
After selecting a solution that can meet the end users’ requirements, boost their productivity, and simplify regulatory compliance, how can an enterprise achieve widespread adoption of the new ECM platform? Some steps to follow:

**INVEST IN EMPLOYEE TRAINING AND AWARENESS.**
Early in the project, employees should be educated about the business benefits of the enterprise content management solution and be given plenty of opportunities to provide feedback during the deployment.

**INVOLVE END USERS IN A PILOT TEST.**
A pilot deployment can rapidly build employee support for the new platform. Besides demonstrating the benefits to the users, a pilot test will strengthen the business case with measurable results.

**STRESS SIMILARITIES.**
If you have selected an ECM solution with an interface that offers your staff a familiar look and feel, the transition will benefit from the intuitive UI and allow users to quickly and easily locate the information they need.

**LET THE SOLUTION SELL ITSELF.**
Experienced users become champions of the solution when they can share with others how it saves time and helps them make better decisions.

In the initial stages, a focused pilot test can simplify the roll out, but that doesn’t mean that an ECM solution should be tested solely for the initial deployment use case. Avoid the pitfall of narrow vision since it could result in the validation of an enterprise content management solution that does not suit the rest of the use cases that could benefit from a new platform. A Forrester survey indicated that 60% of respondents had multiple ECM solutions, and 22% had four or more ECM solutions deployed in their business.

Ideally, an ECM solution should be evaluated in terms of the potential to bring simplicity to company-wide use cases. The pilot test should demonstrate these benefits as they would translate to multiple departments and workflows. With additional benefits that include process automation, reducing paper, simplifying archiving, and strengthening regulatory compliance activities, a best-in-class easy-to-use ECM platform can truly tackle company-wide information management initiatives driven by the business and not just IT.
Across all industries, enterprise content management (ECM) systems get business information assets under control and give authorized users intuitive, fast access to those assets. Convenience and security, however, are just the beginning. The right foundational ECM solution can make it possible to substantially improve workflow management and business process management (BPM) activities.

Any business that is evaluating ECM alternatives should therefore look for a platform that makes it easy to bring efficiencies into the mission-critical, everyday processes that can lower costs, drive productivity gains and yield competitive advantages.
TRANSFORMING BPM WITH ECM

An ECM solution can enable a business to add dynamic controls for automating and managing every-day, vital business processes. For example, an ECM system can automatically fill in forms, and route in-progress content to the right team members. The system can monitor due dates and send out email notifications or post calendar reminders at each step in a business process. Managers can track team member progress on assigned tasks, and they can also set alerts in order to be notified when a task has been completed or when content of interest has been modified. A best-in-class ECM system makes it easy to set up and customize these types of automated capabilities to fit the needs of each group, department and the overall business.

Compared to highly manual business processes, ECM-based workflows bring many efficiency improvements to a broad range of business processes. Since employees can work in parallel without any confusion about content versions, previous bottlenecks can be significantly eased or eliminated. The system maintains consistency and quality in the related documentation, from start to finish of the process, and can also help employees avoid mistakes such as skipped steps.
USE CASE EXAMPLE – INVOICE PROCESSING

Within an ECM environment, an automated invoice processing workflow starts with the definition of the process handling steps. The state of the information attributed to each invoice might reflect “received,” “in review by purchasing,” “approved for payment,” “paid,” or any other defined status.

The process owner can specify which employees can move an invoice in or out of any state. For example, approvals can be restricted to the appropriate purchasing person based on the supplier submitting the invoice.

All of the appropriate employees, based on the workflow definition, can be notified of their processing tasks via email or with automated entries in their calendars or to-do lists. To speed the completion of their steps, employees also have the ability to conveniently search the history of related tasks for a particular supplier by referencing dates or other transaction or supplier attributes of interest.

BPM-FRIENDLY FEATURES

The latest ECM systems offer many features for workflow management. Look for:

- User-friendly content tagging (metadata entry, for state definitions and descriptions)
- The ability to leverage and consolidate all process-related content, including documents (unstructured content) as well as other information objects (structured data)
- Flexible deployment options (support for cloud and hybrid environments)
- Flexible user access, including support for mobile devices such that out-of-office employees do not become bottlenecks
- Fine-grained configuration capabilities
- Tools for tracing the sources of workflow problems
- The ability to record and easily modify workflow conditions
- Security controls (ability to define diverse roles and associated permissions for state transitions)
- Integration of workflow management tools with history logs and audit capabilities (allow managers to compare performance with previous cycles)
Project management encompasses many variables. Each project team includes members who have unique backgrounds and skillsets and who are assigned specific roles and responsibilities. Projects are deadline-driven and team members are typically required to review and sign off on various pieces of project documentation.

Manually managing project-related tasks, processes and documents can be extremely challenging. Email is often the de facto tool for managing the status of project deliverables and for verifying that tasks have been completed on time. Unfortunately, this approach often leads to missed deadlines, incorrect versions of project documentation being used and poor visibility of project activities.

In contrast, project documentation, team members, processes and tasks can be very effectively managed by leveraging an enterprise content management (ECM) solution. Access to information can be based on project team member roles, workflows can be defined for document review and approval cycles and task management can be automated so deadlines are not missed.
A MORE FLEXIBLE PROJECT MANAGEMENT SOFTWARE SOLUTION

Flexibility is key since project elements, deliverables and deadlines often change midstream.

In this regard, an ECM solution benefits project management start to finish. Project components and rules can be easily defined up front, and the ECM solution also provides the ability to modify project parameters later on when necessary. For example, permits can be associated with the person responsible for signatures, and automatic notifications sent to the appropriate people on the project team prior to the permit renewal due dates. Deadline reminders and sign-off requirements can be easily set up and managed within the ECM system. Content access rules enforce role-based visibility during the life of the project, such as who should have access to budget spreadsheet files.

AT ANY TIME, CHANGES CAN BE MADE EASILY.

If a new contractor is enlisted, they can be given immediate access to all relevant project content based on their role.
PERSONALIZED, INTUITIVE VIEWS AND FASTER SEARCHES

Project team members view and organize content differently. However, in a traditional folder-based file system, information is stored in a specific location, and as a result, team members often end up duplicating content, and different versions of documents reside in multiple folders. As project deadlines approach, team members waste precious time not only searching for the information they need, but also verifying that the documents they find are the current and correct versions.

Metadata-based ECM solutions that store a single copy of each unique information asset based on what it is (not where it’s stored) provide a vastly superior and more intuitive approach for project team members to quickly find the precise information they’re looking for. In addition, team members can view and access project content in a more personalized and contextual manner based on specific metadata attributes (by project name, by document class, by customer, by contractor, etc.).

Consider the example of an invoice being received from a subcontractor who carried out an elevator installation in January 2015, which is related to Project A in Building B (part of Phase C). With traditional file folders, the invoice might end up being copied and stored in the folders for the subcontractor, Project A, Building B, Phase C and January 2015 invoices. Conversely with a metadata-based ECM system, a single copy of the invoice would be stored and automatically retrieved whenever anyone was viewing any of these metadata attributes. Documents are visible whenever they are needed, and folders are dynamically created views based on user search parameters.
**BETTER CONTROL OF PROJECT TASKS AND WORKFLOWS**

ECM systems are an effective tool for managing business processes and workflows. Rules can be built around any document or project object. For example, equipment maintenance tasks can be associated with certain individuals or teams. Approval tasks and signatures can similarly be automated, as can resource management. Project managers can quickly determine the availability of any asset and identify people with required training. Evidence of certifications and qualifications can be tracked, and managers can be alerted about completed training (which are common requirements for compliance with standards such as ISO 9001).

With a best-in-class ECM solution, teams gain a project management tool that makes it easier to track and manage tasks and resources. Visibility into the status of any task as well as the details of any specific deliverable is greatly enhanced. Perhaps most important, since projects ultimately depend on the strength of the team, an ECM system improves collaborations among all project team members – both in-house as well as external contractors, subcontractors, suppliers and any other partners.
M-FILES CORPORATION

M-Files enterprise information management (EIM) solutions eliminate information silos and provide quick and easy access to the right content from any core business system and device. M-Files achieves higher levels of user adoption resulting in faster ROI with a uniquely intuitive approach to EIM that is based on managing information by “what” it is versus “where” it’s stored. With flexible on-premises, cloud and hybrid deployment options, M-Files places the power of EIM in the hands of the business user and reduces demands on IT by enabling those closest to the business need to access and control content based on their requirements. Thousands of organizations in over 100 countries use the M-Files EIM system as a single platform for managing front office and back office business operations, which improves productivity and quality while ensuring compliance with industry regulations and standards, including companies such as SAS, Elekta and EADS.

For more information, visit www.m-files.com.