Document management guide

How an ECM system can modernize your document-centric processes

Including
Decision-making guides, benefits, functional scope, project advice and checklists

Document management, enterprise content management, information management, intelligent content automation...

The variety of names used by the IT sector and analysts is confusing and of little help to users seeking a solution to their daily business challenges. Yet they all essentially mean the same thing: It's about creating a company-wide strategic digitalization platform for efficiently managing information in the business process context and for steering the associated workflow. While users often refer to it as document management, what they actually mean is enterprise content management, or ECM for short. ECM covers a much broader scope, stretching over the entire life cycle of documents, emails and files, and incorporating process management functionality. According to AIIM, the latter includes the strategies, methods and tools used to capture, manage, store, preserve and deliver content and documents related to organizational processes.*

According to the study ECM Insights 2020, companies expect an ECM system to deliver the following benefits: to increase productivity and make work easier for employees (33%), to save costs (25%), to maintain compliance (25%) and to further improve customer service (17%).

However, many lack of a company-wide information strategy to achieve these goals.

This guide gives you an inside look at how document management systems work, how they can benefit your company, and the decisive advantages of integrating content and processes on one platform. We also take a closer look at innovation drivers in the DMS market, the roles of artificial intelligence and machine-learning technologies, and offer insights into how to go about choosing and implementing a DMS solution for your company.

Finding the best solution for you

A 2019 AIIM survey revealed that companies plan to spend the highest amount of their budget for content services on document management.[1] Document management is clearly a key priority for organizations. In fact, according to a 2019 study conducted by the digital association Bitkom, almost half of the responding mid-sized firms use some form of a document management tool. Among larger companies, this figure climbs to 96%.[2] Of the benefits these solutions offer, those that ranked highest in the study were faster access to information, protection against data loss, and the availability of information from anywhere.
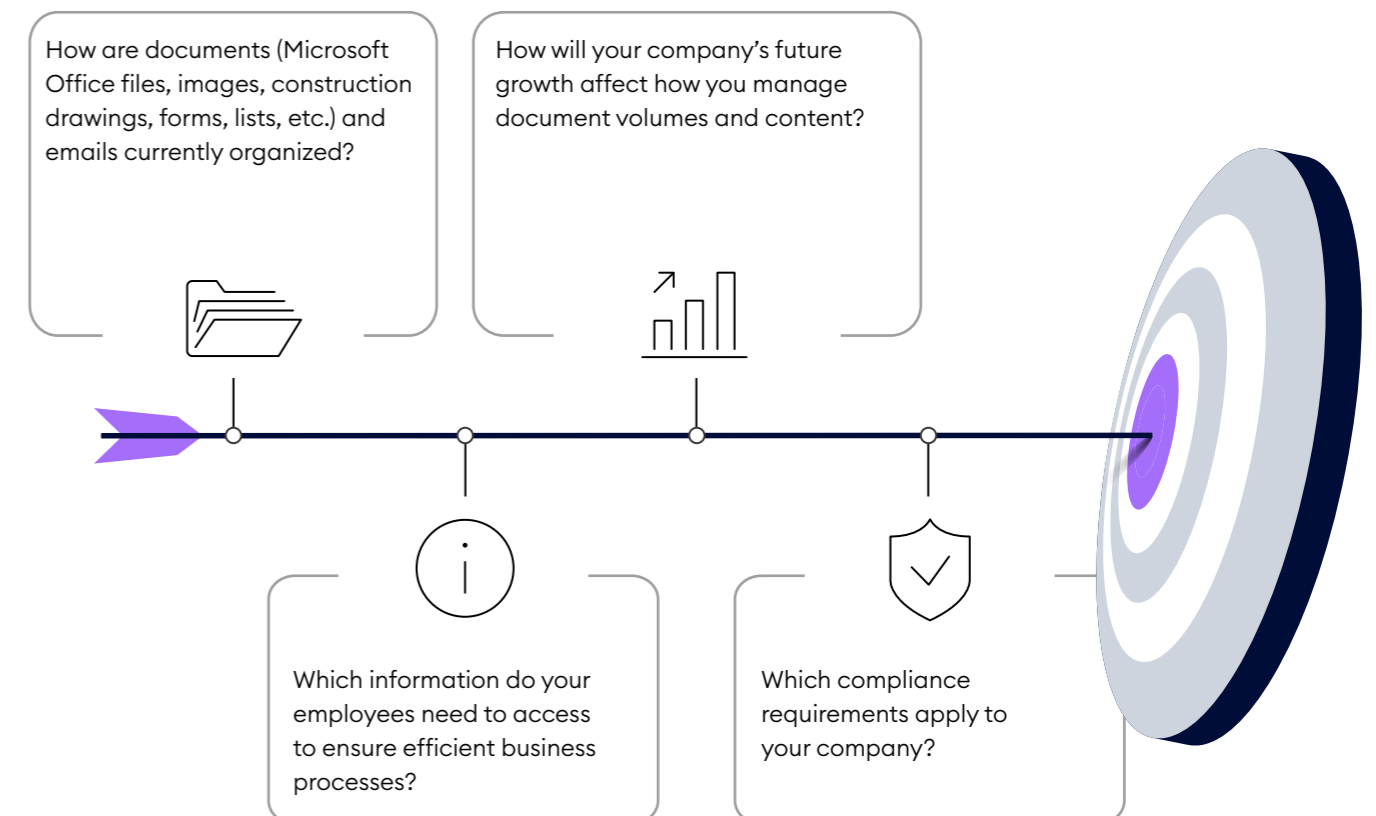
Yet for companies that recognize the appeal of a DMS, choosing a solution that best matches their needs can be a big headache due to the sheer volume of products on the market. A market overview published by the consulting experts at Zöller & Partner, for example, identifies over 60 systems. But it's not always about finding the document management solution with the most bells and whistles. Rather, companies should focus on choosing a DMS that most closely matches their specific individual requirements.

[1] Source: https://info.aiim.org/state-of-the-industry-content-services
[2] Source: https://www.bitkom.org/sites/default/files/2019-10/191021_studie_digital-office-im-mittelstand.pdf

The most pressing questions before selecting a DMS:

The first step towards choosing the right solution is to clearly identify immediate and long-term needs related to how you use, manage and store documents. This will enable your company to work in a more targeted manner with a DMS provider to set up a fully customized solution that contributes to future agility and success.

How are documents (Microsoft Office files, images, construction drawings, forms, lists, etc.) and emails currently organized?

How will your company's future growth affect how you manage document volumes and content?

Which information do your employees need to access to ensure efficient business processes?

Which compliance requirements apply to your company?

Greater efficiency, added security

Faster time-to-market combined with higher customer expectations and competitive pressure all create greater urgency for companies to rethink how they work with documents and information if they are to keep pace with the digital revolution. Today, no organization can afford to waste its employees' valuable time trawling through multiple repositories (even paper binders) for the information they need. Contracts, applications, forms, bids, invoices and much more must be available securely and at the touch of a button. This is the purpose of document management solutions. By enabling people to work on, manage and archive documents completely digitally, they free up time to devote to profit-building activities. These time savings crucially translate into cost savings.

Compliance and security are two further factors that businesses are paying even more attention to nowadays, and the requirements are stricter than ever since the EU GDPR took effect. Other regulations and laws also come into play, such as for electronic records management (e.g. ISO 16175-2), international ISO standards and further sector-specific guidelines. With a certified DMS, companies benefit from end-to-end traceability and the certainty of being fully compliant. Not only does this make audits far less stressful, it also offers a solid basis of evidence should litigation arise.

A DMS tool handles and securely archives documents in a digital format – making them available to authorized employees when they are needed and helping to banish costly paper from business processes once and for all. Because document management solutions reliably manage and protect documents that support the organization, they enhance efficiency and free up time for value-creating tasks.

Companies that implement a DMS benefit specifically from:

● Reduced costs of document filing and archiving

● A more up-to-date basis of shared information to improve decision-making & employee knowledge

● Better resource deployment for value-creating business activities

● Deadline management and fulfillment, e.g. in the context of contracts or invoice payments

● Automated workflows for greater process speed and enhanced efficiency

● Transparency and productive collaboration both cross-department and –company, but also with people outside of the company

What your ECM should be able to do – An overview

A document management system tracks and guides a document throughout its entire life cycle – from context-based creation and management to collaborative work and audit-proof archiving. A modern DMS solution generally consists of the following key components:

Intelligent Content Automation Lifecycle

- Digitize, Create
- Search, Discover, Analyze
- Unify, 360°
- Collaborate, Share
- Version, Archive, Compliance
- Automate, Act, Process
- Learn, Alert, Recommend

Simple, clean, intuitive: The Doxis experience

- **Customize your workspace**
  Work even more efficiently with customized dashboards & widgets according to your role, use case or focus topics

- **Get the big picture first**
  Get an overview of your work before diving into the details

- **Find what you need faster & more easily**
  Save on time with a modern UI that enables you to find what you need quickly & easily
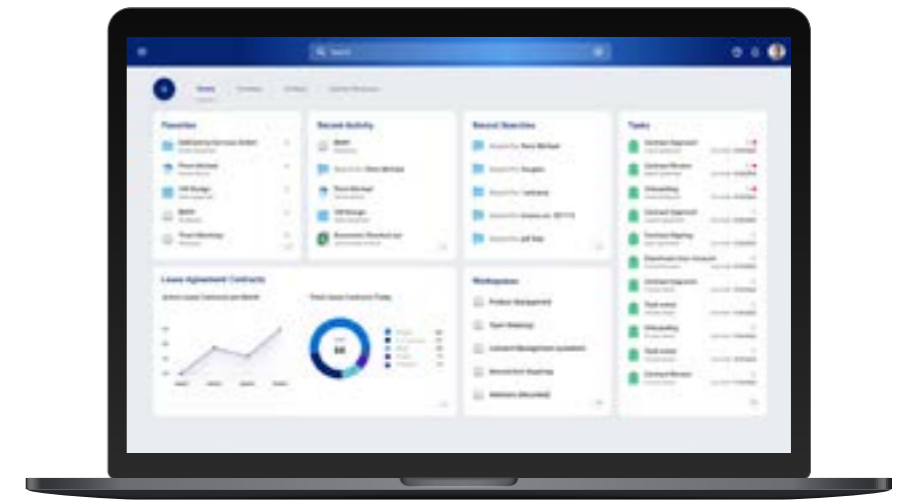
There are a wide range of functions available to users to enhance document-centric work, for example

- Find documents and related information in their specific case or business context
- Monitor deadlines & receive reminders of impending dates
- Work on documents together with colleagues while protecting confidential information
- Securely share and collaborate on documents with users outside of your organization
- Share documents via a link, for instance, by email
- Automatically classify and/or read content
- Integrate them into ERP and CRM systems or other applications and portals

A DMS tool makes all information available everywhere and at all times. Since processes and collaboration run entirely digitally, companies benefit from transparency, flexibility and minimal interruptions in the user experience. This is especially helpful when working in business processes. People find all the facts they need in the context of their tasks and projects, enabling direct responses to customer inquiries, expedited verification and release of invoices, faster application checks, prompt inbound mail processing and much more. Lead times grow shorter and team workloads are dramatically reduced as a result.

Your return on information

There are several drawbacks to maintaining outdated archives across a patchwork of systems and file folders. Information silos form, which not only make document access harder and more time-consuming, but missing or misplaced documents also slow down subsequent business processes and decision-making, and, above all, pose the risk of non-compliance. What's

more, when employees aren't able to access business-critical information, they cannot respond to inquiries from business partners, customers or suppliers in an effective way. Digital information puts an end to many of these challenges and enables companies to reorient their resources with a crucial new emphasis on improving business processes, including:
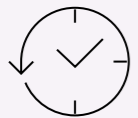
Use time more effectively

Turn costs into a bottom line boost

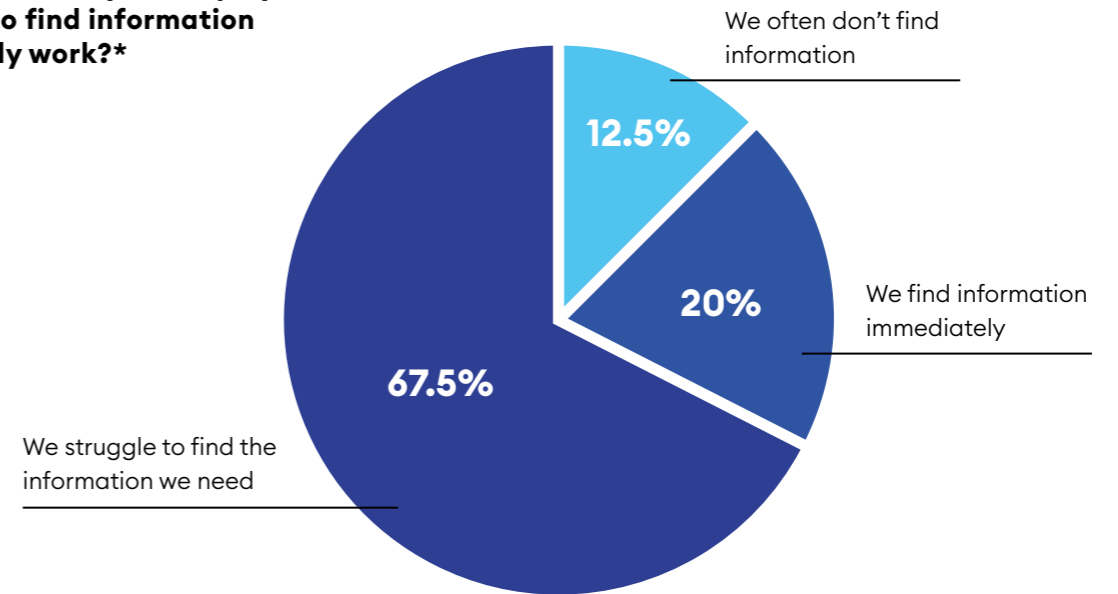**Improve productivity and efficiency**

**Communicate & collaborate better**

Automate document processes

Ensure compliance

How well are your employees able to find information in daily work?*

We often don't find information

12.5%

20%

We find information immediately

67.5%

We struggle to find the information we need

Use time more effectively

The 2019 ECM Insights study reports that only 20% of the responding companies' employees have rapid access to the information they need in daily work, while 12.5% never find the information they need and 67.5% sometimes struggle to find it. Not only is this frustrating for employees and holding them back from performing their tasks efficiently and effectively, but it is a considerable cost factor for the company. With a document management solution, companies can eliminate this and turn newly gained time into productive hours for employees.
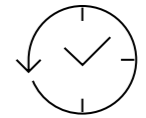
Here are the advantages for your employees:

- With all customer information at their fingertips, they are able to provide first-rate customer service to boost experience, satisfaction and loyalty

- Immediately respond to customers, partners and suppliers with current information to ensure positive long-term business relations and punctual deal completion

- Free time can be applied to building and improving business areas and processes

- Direct access to documents and business information regardless of working location or device (workstation, smartphone, laptop or tablet)

- Better transparency about the status of documents, who has seen and approved or modified what and when to expedite document workflows

*ECM Insights, SER Group, study conducted in 2019 among 1,826 CIOs and IT/process leaders from companies with over 100 million euros annual revenue.

Turn costs into a bottom line boost

As we learned earlier, many companies are devoting the largest portion of their budgets to modernizing their ECM. For good reason: The numbers reveal that these costs ultimately equate to a bottom line boost in the long run. The analysts at Gartner have estimated that document management systems reduce document-based costs by 40%.

There are other ways an ECM saves on costs for an organization. Beyond lower labor costs due to removing manual filing, searching and retrieval, companies also no longer need to invest in storage facilities (which exacerbate document and file access anyhow). EDI Group, Ltd. estimates that companies who implement a DMS will save as much as five US dollars per document. Copier rental and maintenance and paper costs drop dramatically. Office space utilization is thereby optimized. In the case of natural disaster, fire, flood or on-site theft, your company's greatest digital assets are stored safely. And time is money: Intelligent automation of document-based work can save up to 70% time in, for example, invoice processing. The numbers back this up: An IDC study revealed that half of the responding companies that implemented DMS/ECM had recouped their costs after just six months.

Improve productivity and efficiency

Implementing a DMS improves productivity and efficiency in two key ways: By giving employees direct access to documents so they can respond rapidly to inquiries, and by creating the basis for process automation.

A DMS reduces the number of incorrectly filed documents and cuts down on the time spent searching for information and current versions. Documents are consistently filed in line with organizational and legal requirements, which is a key factor in compliance and information governance.

The 2019 ECM Insights study reports that 75% of created documents either end up on file servers or are saved locally to a desktop. The risk of these documents being unavailable to the entire organization – if somebody leaves the company, say – is huge.

ECM Insights also found that 43% of people spend 30 to 120 minutes looking for information every day. The productivity and efficiency improvements gained from implementing an ECM with intelligent, context-based search algorithms and task automation translate into hard cash.

Companies can enjoy further productivity and efficiency gains from:

- Streamlined document sharing and greater accountability with automated workflows, deadline monitoring, reminders and notifications

- Fewer errors thanks to automated full-text OCR and metadata-enriched documents

- Minimized document losses from incorrect filing or information silos

- Cross-departmental access to information for easier collaboration

- Access to a common basis of information delivered in its business context for better decision-making

- Intelligent content extraction and document classification for fully automated routine tasks and data input

Cost savings analysis of eliminated search times			
Number of FTEs (40h/month)	100	500	1.000
Annual wage costs incl. employer contribution (€ 30.00)	5,760,000 Euro	28,800,000 Euro	57,600,000 Euro
Annual time spent searching for information (on average 90 min./day): 360h/year	36,000 h	180,000 h	360,000 h
Annual wage savings resulting from elimination of search times	**1,080,000 Euro**	**5,400,000 Euro**	**10,800,000 Euro**

Digital invoice processing is the springboard to digitalization

Digital inbound invoice processing can save organizations 60–80% of costs compared with conventional invoice processing.[3]

It's all thanks to the elimination of manual tasks: From routing invoices to the accounting team, verifying and processing them manually, and entering accounting data by hand, these manual activities cost time and money. Factor in vacation and sick leave, and a payment might not only be delayed – it could even result in a failure to exploit early payment discounts. Fully digitalized, the same process can speed up significantly.

Higher invoice quality and expedited verification and release processes alone bring forward the average payment date by 5.4 days.[4] Add to this minimal interruptions in the user experience and the assurance of legally compliant, audit-proof archiving and the benefits stack up.

3, 4 Source: Billentis report: "E-Invoice/E-Billing – Significant market transition lies ahead"

Communicate & collaborate better

Whether in the office, using a laptop on site, or out and about with a smartphone, with a DMS users can share documents quickly and conveniently with colleagues, customers, suppliers and business partners. A DMS solution replaces patchwork system landscapes and eliminates information silos. Users benefit from a complete overview of all information generated throughout a business relationship with customers and prospects.
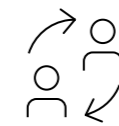
A high-performing solution offers:

- Access to processes, tasks, documents and files from anywhere

- Mobile capture and storage of new documents and images

- Issue of releases, delegation of tasks, or activation of downstream process steps

- Secure and transparent logging of all processing steps within a document

- Work with personalized mobile dashboards

Automate
document processes

Processes and decisions simply do not work without information – which is often found in documents that should be readily available in the business context. ECM Insights reports, for example, that 60% of respondents would like to see emails correctly assigned to business cases. Doing so would put the information they need at users' fingertips rather than having to interrupt their tasks to gather it manually, resulting in distractions and an inability to give core tasks their full attention.

Enhancing the efficiency of precisely these tasks is why document management solutions with integrated process management components – also known as business process manage-

ment (BPM), case processing, or workflow management–exist. They reduce lag times and eliminate tedious routine work. Documents and processes are unified on a single platform to seamlessly link together all business cases, tasks and the associated documents and files. Integration at this level enables companies to work on processes securely, automatically, transparently and compliantly. Metadata unlocks the rapid retrieval of all information relevant to tasks and business cases throughout the entire digital process. At the same time, companies must have enough flexibility to create ad hoc, standardized and automated processes, as well as combinations of the three.

A high-performing solution offers the following advantages:

- Transparent overview of all tasks and business cases

- Automated notifications of defined events

- Appointment and deadline compliance

- Clear overview of responsibilities, deadlines and process status

- Automation of routine tasks

- Dynamic adaptation to new business processes

- Comprehensive information to support case-specific decisions

The positive effects of process management solutions on time management in turn increase profitability almost by default. At the same time, digital business cases create a launchpad for rolling out uniform digital processes across the entire company. Typical examples include order handling, credit applications and claims processing, order approvals and inbound service center inquiries. The recaptured hours can be put to more effective use, for example employees can devote more time to their customers. Since quick wins are equally as important to organizations as the long-term benefits, the DMS should enable them to get a head start on transitioning to digitally managed processes. User-friendly modeling tools that offer the flexibility to dynamically develop and adapt tasks as needed are a must.

My personal highlight are the workflows for all release processes: Basically, I don't have to sign anything anymore. This is really huge progress!

René Schmalen, Head of Aviation Claims
Delvag Versicherungs AG, the Lufthansa Group

Stay compliant

EU GDPR, records management policies, industry regulations

Whether the EU GDPR, regulations on electronic recordkeeping, or sector-specific standards: when it comes to modifying, storing and deleting information, compliance comes first. It's essential to choose an ECM that helps you to fulfill all of the relevant regulations.

Ideally, an ECM provider will have certificates proving its solution:

- Offers access protection for documents, data and processes
- Archives documents audit compliantly
- Automatically complies with legal retention periods
- Securely stores and deletes personal data
- Demonstrates ISO compliance
- Is certified according to SOC2 Type 1 & 2 for the highest level of cloud data security

For more on this subject, please read the section "Stay on the safe side".

Success factors

Launching a document management solution is a large-scale project. Its success, and later the ROI, will depend in large part on how well you assess needs, define the scope and develop a project plan. When looking at functionalities, some key considerations might include the DMS' integration capabilities in the context of the existing IT infrastructure, the implementation of digital workflows, and the unification of processes and information on one platform.

Needs analysis at a glance
We have put together 7 areas your organization should analyze before the DMS project launch to ensure success from the get-go:

Factor 01   **Determine your objectives**

Factor 02   **Define the infrastructure and operation**

Factor 03   **Analyze the DMS scope and parameters**

Factor 04   **Ascertain your document reach**

Factor 05   **Envision your future file structure**

Factor 06   **Identify daily tasks**

Factor 07   **Migrate existing files**

01

Determine your objectives

- Which problems in document management do you need to resolve?

- What do you want your ECM to handle?

- Where should the ECM create greater cost and time efficiencies?

- How do you intend to deploy the system?

- Which document-reliant workflows need to be improved?

- Do you need interfaces to connect the ECM with existing business-critical applications? If yes, which ones?

02

Define the infrastructure and operation

- Do you plan to operate the solution on-premises, in your own data center, in a public or private cloud, or as SaaS?

- Will you operate and configure the DMS yourself or are you looking for a complete managed services solution – or even a hybrid of the two?

- Does the solution need to be scalable?

- What are your support needs?

03

Analyze the ECM scope and parameters

- How many people need access to the ECM?

- Are new hardware components or upgrades necessary?

- How long do you have to store documents?

- How many documents must the DMS handle? To answer this, take the number of existing files to be migrated or linked to the DMS and add the number of inbound/new documents and emails received and created every day, week, or year.

04

Ascertain your document reach

- Do you operate offices across several locations that all need copies of your documents?

- Do you take documents out of the office?

- Do you have to log changes to documents?

- Do you make information available outside your company?

- Which protection mechanisms are required?

- What kind of authorization concept do you need?

- Which compliance requirements apply?n?

05

Envision your future file structure

Many existing file structures are the product of many years of evolution and now lag behind the times. Companies can use the transition to a DMS as an opportunity to rethink and update their entire file structure.

- How do you currently search for information?

- Which kinds of information must be stored in the DMS?

- Which referenced information is necessary?

- Which document classes, metadata and files are to be defined?

06

Identify daily tasks

- How many paper documents and emails do you receive every day/week?

- How do you plan to digitize inbound paper communication (using internal resources or via a scan service provider)?

- Which kinds of information will be scanned?

- What happens to the hard copy after scanning?

- Which typical tasks are to be digitalized?

- Are these processes heavily structured, i.e. rules-based, are they more agile, or are they a combination of the two?

● Which ERP, CRM and HR solutions or other business applications must be integrated into the DMS before cross-system processes can be implemented?

● How will workflows involving external partners, such as customers and suppliers, be managed?

07

Migrate existing files

This step is about determining what happens to existing files. Companies will generally realize the most economic benefits from only digitizing (or converting from legacy storage media) the documents that will be needed in future processes.

● Which existing files should be available in the DMS to ensure smooth-running processes?

● How many documents need digitizing/converting?

● Who will carry out the digitization/conversion? Remember to consider both the costs and the lead time.

● What happens when you need to access legacy documents?

Work out a project plan

Once you are cognizant of the factors involved in launching your DMS, it's time to create a roadmap for the project implementation. DMS projects are first and foremost organization projects and not IT projects. They go deep into the processes and organization of a company. It's often necessary to develop a holistic concept for the required organizational and process-related changes. To accomplish this, decision-makers from the management team of your company must be integrated into the project. Remember: Change management is a key part of rolling out a DMS, and should not be treated as an afterthought.

Get everyone on board - Change management during an ECM launch

Implementing an ECM isn't just about rolling out a new technology – it's about preparing the entire organization for the digital transformation. Securing buy-in from all the people who will use the solution is crucial to the success of such projects. One of the biggest challenges of an ECM project is gaining widespread acceptance and including everyone as part of the project itself. The greater their involvement, the easier it is to overcome resistance and generate enthusiasm for the changes to come.

Some tips

● Show how the ECM will improve users' work environment with specific examples, for instance the elimination of monotonous routine activities or laborious information searches.

● Present the goals the company plans to achieve with the ECM, e.g. a 30% increase in customer satisfaction.

● Give plenty of opportunity to ask questions – and provide precise answers.

● Create platforms containing detailed information on the project, the product, training measures and content. Ideally, this platform will also offer space for questions, discussions and suggestions for improvements.

● Regularly hold briefings to give updates on the project status.

● Put together an ECM team with the necessary roles and responsibilities. Depending on the size of the company, a separate ECM office comprising various technical and organizational roles may make more sense.

● Managers, department heads and HR leads in particular should view change management as one of their core tasks. They must fully subscribe to the benefits of an ECM and set an example to others regarding the positive effects of the digital transformation.

Summary

Securing buy-in from the company's own staff is crucial to a successful ECM project. Change management must be incorporated from the very start and remain a key part of the project from beginning to end. Given that questions will inevitably crop up and systems will have teething problems even after implementation, we advise keeping change management measures in place beyond the end of the project.
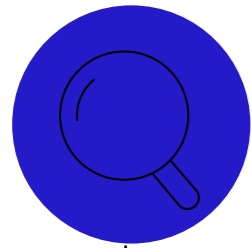
Analyze your organization's requirements

Launching a document management solution is a large-scale undertaking that should have a lasting and sustainable impact. If a project is to be successfully completed on time and budget, it must crucially begin with a carefully prepared requirements analysis of which documents will captured and where these digitized documents will be used and worked on (which departments, processes, use cases, etc.). Companies should also evaluate and document key aspects such as their security and legal retention requirements. The analysis findings are then used as the basis for preparing a summary report.
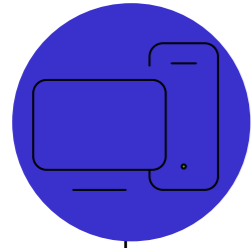
**Meet the technical requirements**

To make sure that your project gets off to the best possible start, it's crucial that the technical groundwork is laid:

- Quick remote access (VPN or common remote maintenance software) to the test and production servers

- Valid third-party software licensing

- Hardware and operating system/server installation

- Database installation and configuration

- Network, network share and firewall set up

- Storage available

- Authorizations (operating system, network, database) set-up

- Access authorizations (both physical and digital) to project, server and training rooms

- Connectivity
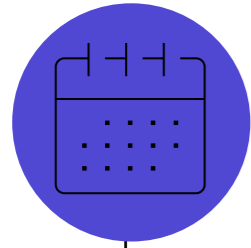
Determine the time frame and set the budget

A detailed project plan sets out work packages and milestones, and assigns resources to where they are needed. It includes the expected project duration, the current status of individual processes, and which employees are responsible for which work packages. Project planning is a way to track all related activities. All team members are assigned specific roles, tasks and responsibilities. Setting milestones with realistic deadlines can also help with progress tracking.
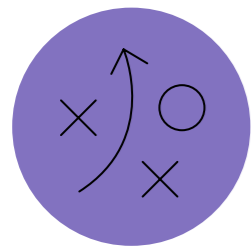
Clear decision processes

The decision processes of your DMS project launch should be clarified ahead of time. Who in your team has the authority to make decisions? What are the workflows like in your company? Who are the experts in charge at your company? Although the project scope has been defined, it's possible that changes will need to be made to it. What is the formal process for the inclusion, assessment, prioritization, planning and implementation of possible changes in the service scope? These questions should be clarified and documented.
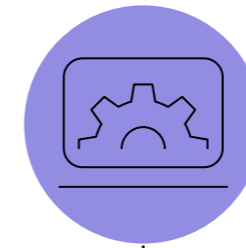
Development

The next step is to develop and configure the DMS in line with the approved specifications. Any necessary changes should be incorporated into the specifications document and agreed before being implemented. This specifications document is key for the hand-over later on.
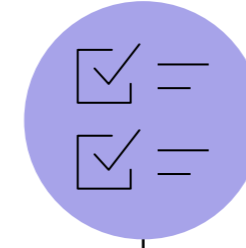
Testing

We strongly advise carrying out extensive testing before implementing the solution to pick up on any problems that could affect productivity once the DMS goes live. This involves testing the individual components, the hardware and software in their operational environment, and the entire architecture. Functions like scanning, data extraction, exports and document routing should be checked to ensure they run smoothly. Back-up systems and media should be verified to ensure the system and all files can be restored if necessary. Finally, load testing ensures that the DMS will perform as expected once it goes live. If the comprehensive tests flag up issues with functions or performance, individual hardware or software components must be checked again and modifications made where needed. Regression testing helps to ensure that the changes do not adversely affect other system elements.
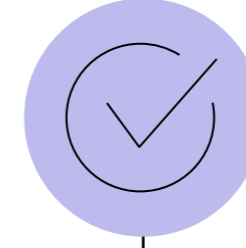
Project hand-over & user training

The project specifications are the basis for a successful and final project handover. Before the go-live, it is important to clarify maintenance and support structures, responsibilities and roles. After the go-live, it's also crucial that your users receive the best possible service and support to ensure continued project success. A support plan provides an overview of contacts and escalation procedures. Many companies fail to recognize how essential it is to provide extensive training for everyone who will be using the system. Offering the correct training to both users and system administrators is the key to a successful DMS roll-out.

Go-live

Rolling out the ECM requires close planning and coordination. We recommend starting with a pilot project for a limited number of users. Project owners can see if the system is being used as expected and that all the system components work as planned. Additionally, collecting user feedback is a quick and simple way to determine training needs going forward.

Agile project implementation

When flexibility is needed most

Agility, the ability to quickly and resourcefully react or adapt, is a key competitive factor for many organizations today. In sectors such as insurance or banking, where it is imperative to respond and adapt to dynamic customer and employee needs for a better customer experience and faster go-to-market, agility in launching IT projects is equally important. In organizations where the requirements of departments and users change quickly, an agile approach to IT project implementation can provide the necessary flexibility and adaptability. While the traditional approach to projects, often called "waterfall", is very common, the number of agile projects are on the rise. If your organization is considering an agile approach, here are some crucial differences to guide your decision.

Project scope: variable or fixed?

Agile – The project scope is variable with the agile implementation approach. The requirements are defined and reassessed incrementally and the solution is adjusted in so-called "sprints" or "iterations". In other words, the end product to be delivered is not specified in the first stage of the project. This is an advantage for organizations that may need downstream flexibility. One insurance customer of ours uses an agile approach precisely because it does not want to invest heavily into a fixed solution when there is a high chance that it will be overhauled within the project period due to emerging new requirements. On top of project agility, it also saves on money and effort.

Traditional – Here, the scope is defined in the first step and only adjusted through controlled change requests later on, which can add to project costs and time. Nevertheless, the organization confidently knows what product will be delivered in the end, as it was defined in the first stage. This level of predictability is very important for organizations not only with a strict schedule and budget, but also those operating in highly regulated sectors; for example, at organizations that must have strict and detailed documentation of projects.

More or less involvement?

Agile – In agile projects, customer and vendor collaborate closely throughout the project. This can be a plus: There are constant opportunities to incorporate feedback, fewer project team silos emerge, and the end product quality is higher due to project owner involvement. This can pose challenges, however, when internal teams are not available.

Traditional – While communication is also important in traditional projects, customer-side involvement is not as intense throughout the project. There is a greater need in the concept phase, however, to get extensive feedback.

Need to roll out quickly?

Agile –To roll out a solution quickly, it's possible to implement a prototype and then fine-tune it over time. There is no long concept phase or countless meetings with experts.

Traditional – In well-managed projects, especially large-scale ones, with precisely defined requirements, the traditional approach is likely to stay on time and in budget. Large-scale projects can be controlled more effectively this way.

Conclusion
We strongly urge discussing the two options with your ECM provider, who ideally has experience in both approaches. In our experience, it may also make sense to take a hybrid approach with both traditional and agile components.

Content and processes belong together

When talking about processes, tasks and so on, it's important to clarify the various terms: A process is a series of individual work steps, also known as a workflow, comprising part of a business process or other kinds of organizational processes.

Once upon a time floating files were a familiar sight in processes. Under ideal circumstances, they would contain all of the documents an individual needed to work on their part of the process – i.e. make decisions, launch downstream tasks and pass on the file including any new comments to the next colleague. But the downside to this is that documents ended up being distributed across the company and became unavailable to other people who might need them. This is especially true for complex processes involving several departments. Factor in departments located on different sites and the need to send floating files by regular mail, and it adds up to processes that take an "eternity" to be completed. Any form of parallel or automated processes is unthinkable. Not only that, but it's impossible to keep track of who is working on which process and where the documents are. Inquiries wait unanswered while the relevant documents are lying around on a desk somewhere.

This depiction of the floating file makes one thing very clear: Information is essential to working on processes. In other words, processes and documents belong together. Unfortunately, the reality of the situation is often very different. Information is still being separated from processes, and DMS or process management solutions are seen as entirely disconnected entities.

According to AIIM, companies are becoming increasingly aware of the shift in importance of (document) content from an isolated priority to a key factor for processes. A 2019 AIIM study entitled "State of the Industry – Content Services" reports that 26% of decision-makers see an urgent need for the close integration of content and processes. Consistent with this finding, 44% say that integrating content into core business processes is the most important requirement.

Documents and processes belong together

A DMS that integrates business process management on one platform brings together what belongs together: documents and processes. Documents activate processes and are essential to their completion.

There are no processes without documents, and there are no documents that do not form part of a process.

Case 1

An insurance provider receives a claims form from a policyholder and forwards it to the relevant customer advisor…
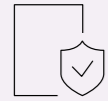
The advisor contacts the customer to clarify any details, fills out the associated form and hands over the case to the claims settlement team. Using metadata, the claims settlement team can access all documents, images and more in the policyholder's file or the claim file in order to make an informed decision on how to proceed. The customer advisor or the customer themself is then notified of the decision. Countless insurers have now made the switch to automated claims processing via an online portal, giving customers the opportunity to file their claims directly. The uploaded documents are transferred via interfaces to the DMS where they can be accessed by the relevant team members. The BPM component then steers the downstream process and creates links to the relevant documents. Once the claim has been fully processed, the DMS sends a status notification to the portal and the customer is informed. Everyone benefits from this perfect end-to-end workflow: Customers are happy about prompt responses to their claims, and team members are happy about the added transparency in cases along with access to all the information they need for rapid handling.

Case 2

A production company receives orders for individually configured machinery…
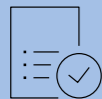
The requests are needed by both the sales team for further handling and by the assembly team so they can order the necessary components. To avoid wasting time, both departments ideally can work in parallel. But where hundreds or even thousands of components are required for one machine, it's easy to lose track or have to search high and low for all the necessary documents. That's not to mention the strict requirements for documenting plants and machinery over their entire life cycle. When documents and processes are combined on one platform, everyone involved can dovetail their activities to expedite action. The added transparency significantly improves process efficiency and minimizes the risk of errors or duplicated procedures caused by using outdated information.

Case 3

Contract negotiations with customers and suppliers are part and parcel of every business….
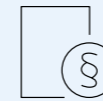
Oftentimes these can involve several departments, such as purchasing/sales and the department in question. Automated processes with deadline monitoring and access to up-to-date contract content help ensure timely releases by decision-makers at every step. Not only that, but contract management tools also ensure that employees are informed in good time of possible cancellation options to ensure deadlines are never missed again. An ECM with integrated artificial intelligence (AI) functions can also flag potential risks, such as where a contract clause becomes invalid.

Case 4

Invoice processing, verification and release, order management and application approvals are further typical processes found in virtually every company…
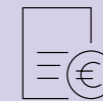
Processes like these can only be automated if the departments involved have direct access to the relevant documents – which requires a company-wide platform that seamlessly combines documents and processes. The result is unified customer data, product information and processes. The days of information being filed across several systems are a thing of the past.

Integrate with ERP, CRM and other business apps

Why the integration capabilities of your ECM with business apps is so crucial:

ERP, CRM, HR suites... These and many other systems each have a role to play. They are not designed to manage documents or customer correspondence, and they are certainly not for archiving. While some systems may offer limited document management functions, this only serves to create information silos that hinder cross-departmental work on processes.

That's why it's so important not only to bring together documents and processes on one platform, but also to closely integrate ECM systems with other business applications. Without this, cross-system processes are impossible. Companies also benefit from the elimination of redundant data storage across multiple departments and gain a 360° view of information.

- **A new entry in the CRM system, e.g. Salesforce, can require an addition to the customer file stored in the ECM.** Conversely, a process initiated in the ECM can trigger activities in the CRM system.

- **An ERP system like SAP can store orders, material master data, prices and all kinds of other commercial data.** By contrast, customer correspondence is located in the CRM or in the ECM customer file. To ensure employees have a complete view of all available information, they should be able to access the information directly from their ERP software. When these systems are bridged and the information is connected in a structured, contextual way, employees get an enriched 360° view of customers, suppliers, etc.

- **Complex projects require a constantly up-to-date and complete overview of the entire documentation, which includes contracts, supplemental documents, blueprints, correspondences, etc.** To always have the latest information, it is crucial to work with the latest document versions. This is where an ECM comes in: It acts as an information hub by creating links to relevant documents and data from any other application. This information can also be securely and easily shared, even with users outside of the company.

On top of this, users can directly launch processes from customer, supplier, HR and other files. The task assigned to the relevant team member includes direct access to all the information they need. Processes are thus incorporated into files and the steps documented therein. Everyone can pick up working on processes where the last person left off and give out information safe in the knowledge that it's up to date.

Consequently, the ECM that will be implemented should not only be able to manage processes, but must also slot into the existing application landscape and offer seamless communication with business applications without the need for extensive integration measures.

The practical examples also clearly demonstrate the varied nature of processes. They can generally be broken down into two types: rule-based and agile (or flexible) processes. Companies planning to roll out a DMS with integrated process management tools should take a look at their workflows before choosing a platform. Most will find that both rule-based and agile processes are used in daily business, albeit in varying constel-

lations. We recommend looking for a DMS that offers hybrid process management tools that are capable of mapping any combination of structured and ad hoc processes. Document-centric processes in particular, such as those used in customer support, insurance claims settlements, or for invoicing services in the healthcare sector, rely on a combination of IT-supported, standardized workflows and adaptive elements. This is generally known as classic case management, where the focus is on the processor's information and their individual decision-making powers. A process that rigidly follows the same pattern will impact the customer experience. The principal purpose of a DMS is to enable these hybrid processes to be easily mapped and made available company-wide. Also known as "adaptive" processes, they form the essential backbone for profit-building business activities. This applies above all to banks, financial service providers, insurance providers, telecommunications providers, energy providers, hospitals, public administrations and service providers.

Stay on the safe side

EU GDPR, ISO 16175-2, audit security

Whether the it's the EU GDPR, ISO 16175-2, domestic regulations on electronic record-keeping or audit security: when it comes to handling, modifying, storing and deleting information, compliance comes first. With a certified ECM, companies fulfill legal compliance requirements, regulatory standards and internal compliance guidelines – putting an end to the threat of sanctions, financial risks and potential harm to their brand image. The 2019 ECM Insights study reports that over one-third of companies see compliance requirements as a major reason to consider document management systems. This is unsurprising, given that companies can use an ECM to create the basis for compliance with various legal standards without hindering the way people work on documents.

Business process oversight & compliance

It is a normal part of most business processes that various people can access and modify the documents involved. Each of these steps must be transparently documented so as to ensure full compliance with all regulations. The same goes for decisions and approvals. Companies in heavily regulated sectors are particularly affected, such as financial services providers, manufacturers, food producers and pharmaceutical companies. They must be able to transparently prove to independent auditors their compliance with applicable documentation requirements at all times. Other companies are affected too – for instance, every accounting department that must comply with regulations regarding electronic recordkeeping. These companies must be able to prove they fulfill the requirements of domestic commercial and fiscal codes on the capture, posting, processing, storage and deletion of data and documents.

An ECM can help ensure oversight and compliance with the relevant requirements by seamlessly and transparently documenting the entire process, from creation, processing, verification and release of the documents through to distribution. This audit trail function has further benefits, helping with ISO certifications and quality seals that, in turn, support tender processes and attract new customers.

The section "Stay on the safe side" contains a detailed description of how document management systems can help companies to fulfill compliance requirements. It looks at how personal data used in a process context is handled in accordance with the EU GDPR.

Avoid tax setbacks

Invoices, contracts, order confirmations, annual reports: Companies are required by law to archive tax-relevant data and documents for specified retention periods of several years. These documents can be stored in digital format to cut down on growing storage space costs. Importantly, the documents must be archived audit compliantly and completely, always available and in readable and machine-readable format. With a certified ECM, companies can prove to the tax office and to tax auditors that they meet these requirements.

Invoices

Contracts

Order confirmations

Annual reports

Comply with EU General Data Protection Regulation (EU GDPR)

The EU GDPR took effect on May 2018, bringing with it numerous additional rights for EU citizens regarding their personal data.

The main changes include:

● **Right of access by the data subject**

The data subject has the right to obtain confirmation from the controller as to whether or not personal data concerning him or her is being processed, and, where that is the case, to access to the personal data and the information. (Art. 15 – EU GDPR)

● **Right to erasure**

The data subject has the right to request that the data controller immediately erase personal data. (Art. 17 – EU GDPR)

● **Right to data portability**

The data subject has the right to receive personal data concerning him or her, which he or she has provided to a controller, in a structured, commonly used and machine-readable format and has the right to transmit that data to another controller. (Art. 20 – EU GDPR)

Companies that fail to uphold these rights risk facing heavy fines. And even though the EU GDPR has now been in effect for about two years, many have still not implemented the requirements. More than one-third of decision-makers surveyed in the 2019 ECM Insights study admit that they are unable to foresee whether they could meet the requirements.

A DMS gives companies the necessary basis to establish EU GDPR-compliant data protection, for example in an SAP environment. It enables them to securely store data and documents, to set up access control, to document inspections and modifications, and to demonstrably delete data, if requested. We recommend that personal master data and documents are flagged as such upon being filed in the digital archive. A DMS with integrated artificial intelligence tools can identify personal data even faster for assured compliance with the EU GDPR.

Signed and sealed

A certified ECM offers a basic level of guidance and certainty by guaranteeing that it

- Complies with the relevant legal guidelines

- Complies with industry standards

- Offers full support and secure communication for production systems such as SAP and Microsoft.

The ECM must fulfill the technical and organizational requirements of domestic and international laws, regulations, norms and standards when processing information. Companies are able to demonstrate to internal and external auditors, experts and lawyers that they deploy software that stores business and tax-related documents in an audit-proof way, that is able manage documentation in compliance with the law, and that offers sufficient protection from digital manipulation, loss and theft. They can also demonstrate to customers, suppliers and investors that their information and processes are managed in compliance with laws and regulations. This builds trust and improves the company's reputation.
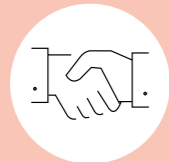
Security

You can manage information and processes according to regulations

Transparency

You can provide documentation to auditors, experts and lawyers

Trust

Partners, customers and investors want to work with you

Competitive advantages

You avoid tax and liability risks and strengthen your reputation

Get ahead of the competition with artificial intelligence

As highlighted in the previous section, companies can realize substantial efficiency gains by implementing a DMS with integrated BPM tools. And the benefits don't stop there. Where document management systems reign supreme is their ability to combine both content and processes with the right analytical approach – bringing together DMS, BPM and artificial intelligence (AI) as content services on one platform. We call this intelligent content automation.

According to Wikipedia, AI can model certain human decision-making structures, for example, by using a computer that is constructed and programmed to handle problems with a relative degree of autonomy. AI technology has been commonplace for many years: Bots that can independently respond to customer inquiries, self-driving buses, or guidance systems that use traffic information to suggest alternative routes are just some examples from everyday life.

Maturing technology

According to Statista[5], revenues across all global sectors are steadily increasing through the adoption of artificial intelligence. Yet, despite the current hype surrounding this topic, this is not a new field. Companies have already been leveraging the benefits of intelligent methods like inbound mail processing or automated invoice data reading for many years. As hardware and software become more powerful, processing times have continued to drop while the recall rate has skyrocketed.

AI is evolving from only being able to read structured data, such as invoices, to being capable of analyzing unstructured documents – recognizing patterns, locating relevant content and extracting metadata. Organizations are becoming increasingly aware of this and are choosing to deploy modern DMS solutions that integrate cognitive services to make AI and machine-learning technologies directly available for all DMS applications.

Structured Content Services

Unstructured Content

Single view of a customer

Single view of an employee

Single view of a patient
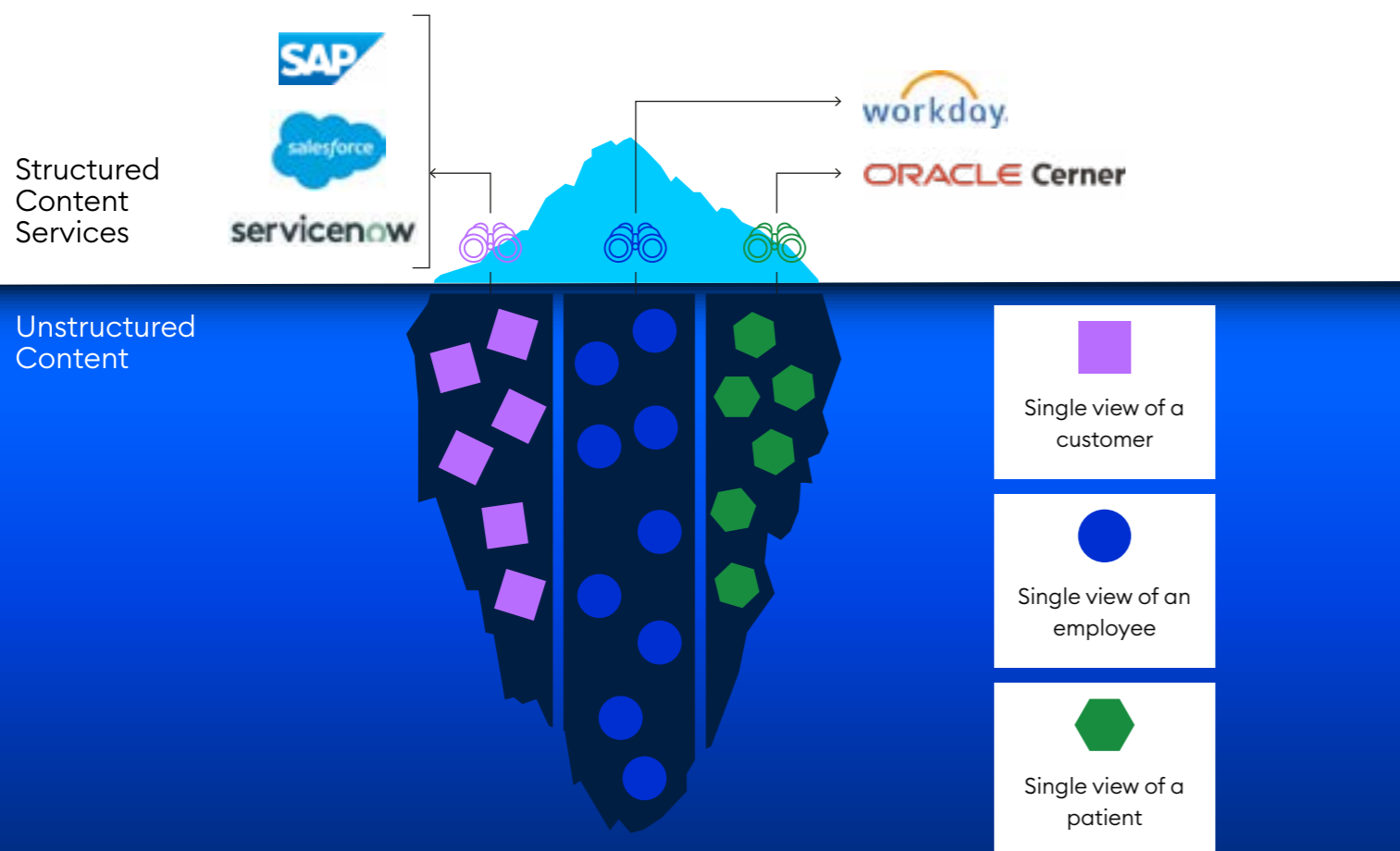
The automation of document-driven processes frees up companies to refocus their existing resources:

- Documents, images, audio files and videos are automatically classified into taxonomies or, e.g. assigned the corresponding metadata.

- Document types are automatically recognized and classified – especially during inbound mail processing.

- Emotions are identified in email, digital correspondences or social media posts to, for example, optimize customer service.

- Names of people, places, companies, institutes, etc., e.g. personal data (EU GDPR), are recognized and extracted.

- Patterns and anomalies are uncovered in documents to identify risks, e.g. invalid contract clauses/attempts at fraud.

- Users are helped to quickly identify experts in specific areas of a company, e.g. workflow experts.

- Smart assistance functions help with complex tasks by suggesting similar documents, experts, or suitable workflow steps.

Garbage in – Garbage out

Businesses that plan to use cognitive services should take the necessary steps ahead of implementation and ensure they choose appropriate technology with methods suited to their requirements.

- The AI must be trained with a sufficient volume of high-quality data – this makes up the largest part of the preparatory phase. With poor data quality, there is a huge risk that an AI system will not properly detect patterns and will thus draw the wrong conclusions. Data silos and outdated legacy systems are a huge obstacle to the success of AI applications. Organizations should always do their homework and consolidate "clean" data in a single ECM to provide AI applications a basis for delivering the best possible results.

- If unstructured texts are to be analyzed, the choice of technology is vital. In order to prevent a disaster, we recommend choosing a vendor with plenty of experience and expertise. The AI technology you deploy should deliver reliable and transparent results. Leaving it to its own devices is incredibly risky. For example, companies can end up paying a high price should an AI system negatively influence a business decision. To prevent this from happening, full transparency must be ensured at all stages on how the AI makes decisions and which information flows into the decision-making proc

Machine & rule-based learning

The best of both worlds

To ensure AI strikes the perfect balance of accuracy, speed, effort and costs, it must be capable of mastering both machine and rule-based learning.

Machine learning works by training the system using sample data. It is based on statistical concepts; the system does not understand the meaning of the text. A sufficient volume of reference examples is needed in order to adequately train the system. By contrast, rule-based learning is used in complex applications, for instance special terms in patent specifications or documents in security-critical fields. If special expertise is necessary, a simpler solution – compared with machine learning, which would require far too extensive a training volume – is to explicitly input and maintain rules. However, excessive rules and the attendant high workload are just some of the typical downsides to rule-based learning. A detailed description of approaches to content analytics classification can be found here.

Intelligent document automation & beyond

A content services platform that combines comprehensive DMS and BPM functionalities with AI can provide the basis for modern information and process management.
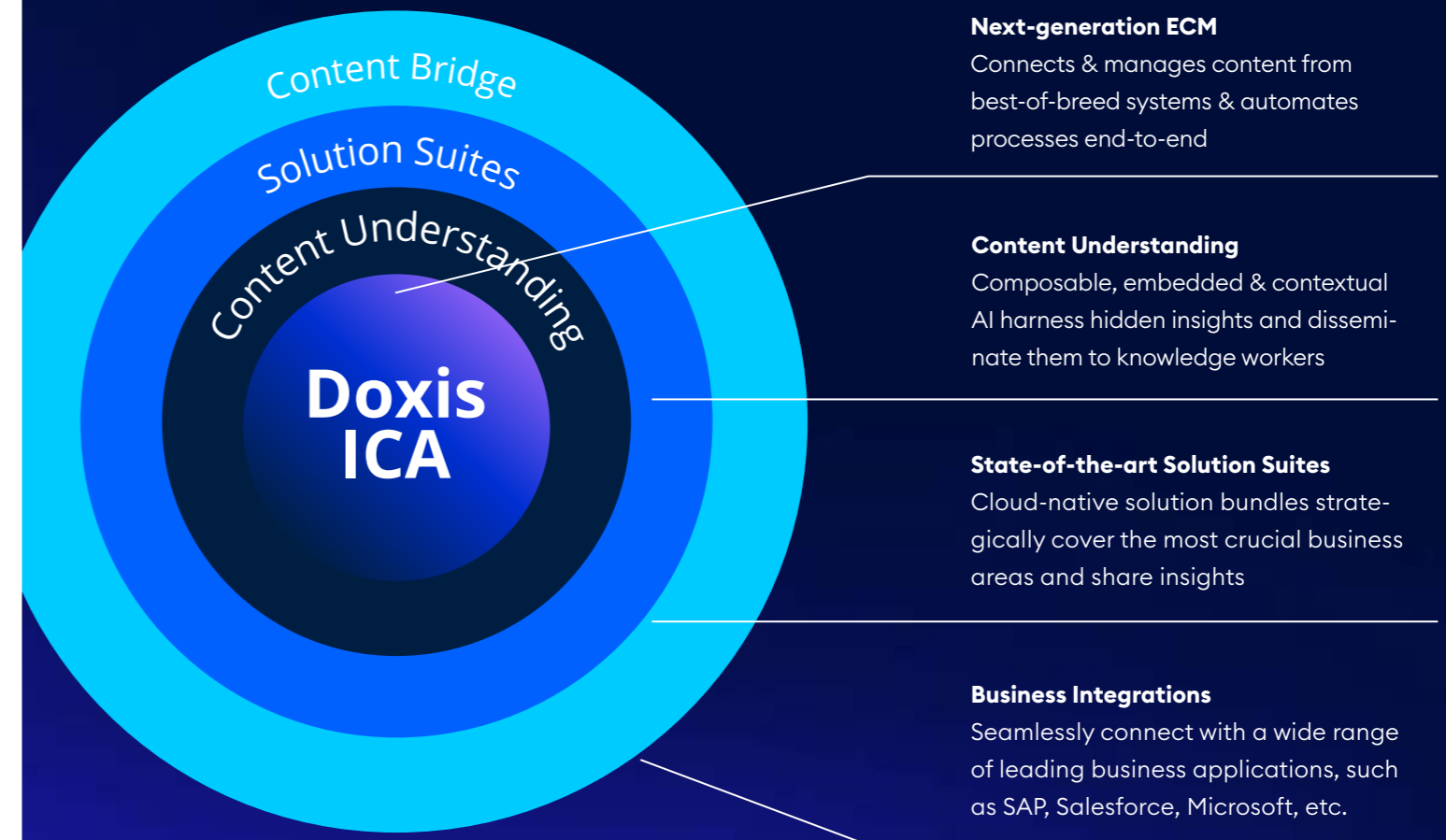
It's a major value-creation opportunity for organizations, for example by:

- Automating routine tasks and reducing employee workloads

- Mining relevant information from unstructured data

- Optimizing customer service with expedited lead and response times

- Streamlining complex tasks with smart assistance functions

- Automatically flagging risks, e.g. EU GDPR violations

- Improving usability and user experience

The next generation of ECM: Intelligent content automation

Connecting your company's information and creating a shared content awareness are vital to boosting productivity, user experience, visibility into business, revenue opportunities, compliance and much more. With Doxis Intelligent Content Automation (ICA), SER offers the next level of enterprise content management: an AI-powered platform designed specifically to bridge and automate content across best-of-breed apps like SAP, Salesforce, Microsoft and more to deliver a contextualized content experience and create a future-ready digital workplace.

Content Bridge
Solution Suites
Content Understanding
Doxis ICA

Next-generation ECM
Connects & manages content from best-of-breed systems & automates processes end-to-end

Content Understanding
Composable, embedded & contextual AI harness hidden insights and disseminate them to knowledge workers

State-of-the-art Solution Suites
Cloud-native solution bundles strategically cover the most crucial business areas and share insights

Business Integrations
Seamlessly connect with a wide range of leading business applications, such as SAP, Salesforce, Microsoft, etc.

SER

ƆOXIS

We would be happy to guide you in the decision-making and implementation of your document and process management solution.

As a provider with over 35 years of experience in consulting and implementation, we offer the know-how and software suited to your company and its challenges.

We look forward to hearing from you!

SER Solutions International GmbH

Joseph-Schumpeter-Allee 19
53227 Bonn | Germany
Phone: + 49 228 90896-0
Fax: +49 228 90896-222

www.sergroup.com
info@sergroup.com

Checklists

Capture/creation	✖
Does the software support multiple scanner types?	
Can scanning processes be initiated automatically?	
Lassen sich Scan-Vorgänge automatisch starten?	
Can you annotate scanned documents, e.g. with highlighting, stamps, or by adding comments?	
Can you import photos from digital cameras or mobile phones and automatically straighten slanted or skewed images to create a clean and usable OCR text?	
Can you scan additional pages and add them to existing documents?	
Können Sie weitere Seiten in bestehende Dokumente einscannen?	
Does the system automatically delete empty pages?	
Can you file electronic documents such as images, text, spreadsheets, PDF files, videos, CAD and audio files in their original file formats?	
Can you send documents to the DMS via Windows Explorer?	
Can you file documents directly from Microsoft Office applications?	
Can you automatically extract metadata from scanned documents?	
Is it possible to define metadata fields as mandatory fields?	
Can you import electronic documents via drag-and-drop?	
Can you automatically extract text and metadata from electronic documents?	
Can you extract data via OCR, barcode recognition, or optical mark recognition (OMR)?	
Can you query data from third-party systems or external databases to minimize the need for manual data entry?	
Can you automatically extract data from documents and use it as metadata for documents, eFiles, or processes?	
Can the system automatically classify documents, e.g. using the layout, content, or barcodes, or by matching extracted data with third-party systems?	
Does the system automatically manage downstream processes based on the document's classification status?	

Does the system support metadata for all document, eFile, or process types?

Can you create limitless numbers of document classes for different types of documents?

Is it possible to define an input format for metadata fields?

Can you reassign or update document classes or metadata fields?

Can you select from suggested terms (value lists) to standardize metadata entries?

Can you transfer metadata for documents over from parent files or processes?

Does the system support multi-level, dependent metadata fields? For example, where the "Street" field only shows values that match the town/city selected in the parent field.

Can you choose values from a database when assigning metadata?

Document management and versioning	✖

Is the electronic file view user-friendly and intuitive for easy and flexible document management?

Can you see the document names, metadata and other supplemental information directly in a result list, an eFile, or in a process?

Can you reorganize documents (e.g. change the page order, delete individual pages, add new pages)?

Can you re-order the pages in a document using drag-and-drop?

Is there a check-in/check-out function?

Does the system distinguish between and support main (major) and working (minor) versions?

Can you compare different document versions?

Can you restore earlier versions?

Is it possible to assign different access rights to major and minor versions?

Can you subscribe to documents, eFiles and processes for notifications of all changes?

Can you link documents together to create relationships (e.g. link the attachment to the email)?

Can you link documents with unlimited numbers of eFiles and processes without creating duplicates?

Is it possible to freely link eFiles with other eFiles to see the information from multiple perspectives?

Can you set up public and private folders or electronic files to simplify the exchange of documents and email folders and create ad hoc workflows?

Can you highlight text passages in images and documents (highlighter tool)?

Can users add electronic sticky notes to documents?

Can you create fully customized stamps?

Are annotations searchable and can they include hyperlinks?

Are annotations created on a separate layer so as to preserve the integrity of the original document?

How many native formats can the integrated document viewer display?

Can documents be previewed directly in an eFile or process?

Can you export result lists as CSV files for reporting purposes?

Can you display documents side by side?

Can you add specific actions or links to other applications in the client ribbons/toolbars?

Retrieval and routing	✖

Is it possible to perform metadata searches for documents, eFiles and processes?

Is there a comprehensive full-text search function across all areas?

Can you perform fuzzy searches or wildcard searches?

Can you perform fuzzy searches or wildcard searches?

Can you perform typical search actions via a simple search field (like in Google)?

Can you search using tags, creation or change dates, notes, versions, comments, or other criteria?

Can you save predefined search criteria for future use?

Does the system offer fuzzy searches or suggest similar documents, files, or processes?

Can you combine search criteria to limit the number of results (Boolean search)?

Can you restrict the search to specific eFiles or folders?

Are the found locations highlighted in the documents returned from a full-text search to expedite retrieval of the necessary information?

Can you bookmark search results for quick access or to update the results?

s the text excerpt in the document identified through a full-text search highlighted to show you the word or phrase in its original context?

Does the system support enterprise searching, e.g. in Windows Explorer, Microsoft SharePoint etc.?

Does the system offer a full-fledged web client (HTML5)?

Can you share links to documents, eFiles and processes?

Can you give external users temporary access to documents, eFiles and processes?

Can you export electronic documents in their original format?

Business process automation ✖

Can you model complex business processes using an intuitive graphical user interface?

Can you implement automatic rules-based routing for inbound documents?

Can you create and start ad hoc processes directly in the client?

Is it possible to add ad hoc elements to predefined processes as and when needed?

Can you spontaneously invite users to participate in processes?

Does a process model show users which steps are currently required for which business process?

Can you enhance productivity with automatic email notifications?

Does the workflow offer follow-up options and escalation mechanisms?

Can you design your own workflow activities?

Does the workflow include database activities that allow information to be transferred to or from another application without the need for any programming?

Can you execute a workflow based on an action (e.g. filing a new document, creating an eFile) or a timeline?

Is it possible to launch workflows based on activities in other applications?

Can a workflow retrieve or initiate another workflow?

Can you easily convert proven workflows and ad hoc workflows into process models?

Can you assign access rights to documents and eFiles dynamically and process-dependently?

Location-independent access ✖

Are native apps for smartphones and tablets available for mobile users?

Does the system work offline, so you can access information from remote places or in flight mode, for example?

Can users access documents and eFiles and participate in business processes all from mobile devices?

Is it possible to capture and work on files and documents when on the go?

Can external users be invited via a simple email to access shared project rooms for collaboration purposes?

Storage and compliant archiving ✖

Is the physical storage location of documents completely independent of filing in the DMS system?

Can documents automatically be transferred to other storage media at any time?

Is the data hierarchy in the DMS system separate from the document hierarchy on storage media?

Can you set up the software to protect documents by making them read-only to prevent manipulation or deletion (SoftWORM capabilities)?

Can you move entire document pools along with all metadata, eFiles and process links?

Can the system automatically convert documents into secure long-term file formats such as PDF-A or TIFF?

Is the system certified to IDW PS 880?

Is the system certified to ISO 16175-2 (NEN 2082)?

Is the system certified to country principles on electronic data storage?

Is the system certified as EU GDPR compliant?

Can you manage files and documents and implement business processes using one unified system?

Is it possible to assign retention rules to living documents and archive them at any time?

Can you manage physical documents and files together with scanned and electronic documents?

Can you manage digital video and audio files as well as other electronic file types?

Can you demonstrate that documents were destroyed at the end of the retention period?

Does the system have an audit trail function for the seamless documentation of all workflows and changes made to documents, eFiles and processes?

Can you define multiple conditions that must be met before documents or eFiles can be deleted?

Can the system automatically assign retention rules based on document properties, file parameters, or predefined triggers?

Can the system automatically classify inbound documents subject to retention, assign the right retention rules and file them in the correct context?

Can you structure a user-friendly work environment and view of information for departments and users while retaining documents subject to retention in their original state and context?

Is it possible to define event-based retention and deletion rules?

Is it possible to define time-based retention and deletion rules?

Does the system support the physical (irretrievable) deletion of documents?

Can you perform a targeted search for documents and files due for logical or physical deletion or which are frozen?

Can you freeze electronic files or take a snapshot of a specific file status?

Is it possible to assign one or more legal holds to documents and files?

Can you set a review date for important documents and eFiles?

Can you change the properties of individual documents in an electronic file?

Does the system automatically notify the relevant users about documents or eFiles with approaching deadlines or which are due for deletion?

Technology

Does the system have an extendible, modular structure capable of combining ECM, BPM and cognitive services on a unified platform?

Does the system include an AI-based service for document classification and content extraction?

Can you flexibly deploy the system on-premises, in the cloud, or a combination of the two?

Is the system available in the cloud as software-as-a-service, eliminating the need for you to handle operation and maintenance?

Can you flexibly adjust system capacities (users, volumes, locations, storage, etc.) in line with your needs?

Does the system offer uniform metadata for documents, eFiles, processes and tasks?

Does the system support multiple operating systems and database systems, giving you flexibility when choosing your infrastructure?

Does the system offer intelligent replication and caching mechanisms and distributed storage systems for optimum access to information, including in global application scenarios?

Is the system Unicode- and multitenant-capable and available in several languages?

Does the system include a report module that enables you to create analyses of your documents, eFiles, dates, deadlines, process statuses and much more?

Can you design, configure and maintain your own DMS apps customized to individual departmental needs in an easy-to-use, low-code environment?

Does the system offer a convenient transport mechanism for the easy and secure roll-out of new and updated applications?

SER