

# 5 strategic processes for ECM success





Processes are the engine of companies of every size and segment, and content is the fuel that moves business. Many of the support information that guides enterprise activity is stored in electronic files and documents, such as purchase orders, operational procedures, contracts, engineering drawings, and many others.

**Ensuring quick access to the right information is a crucial aspect for business to flow faster and for people to do a good job.**

The volume of information grows day-by-day in all organizations, and unfortunately, digital documents can easily be lost, misplaced, or duplicated, lowering employee productivity and promoting information chaos.

**To overcome pressure from the marketplace, customers, the government and regulatory agencies, organizations need to adopt new strategies and implement best practices in content management.**

The concept of **Enterprise Content Management, or simply ECM, is related to the management of information in all its forms.** ECM engages the whole organization, and in addition to management, it also includes tools, methods and related strategies, intended to capture, store and deliver information so that an organization can ensure compliance, enhance communication between teams and promote governance initiatives.

**Enterprise Content Management improves business productivity and agility by providing better access to information and creating a foundation for sharing, securing and reusing this content throughout the enterprise.** ECM allows companies to reduce data hardware and software costs while integrating key information in unique ways to exploit new opportunities or quickly adapt to new business requirements.

**Now that you are familiar with the basic concepts of ECM, learn more about 5 strategic processes for ECM success:**





# 01 | Capture

Capture can be defined as a set of tools and technologies to capture documents, their relevant information or both in order to meet repository requirements or supply an input for a business process.

A document in the tray compromises the efficiency of processes and makes them more expensive. To be well understood and useful to the business, information needs to be captured.

ECM allows for capturing from several sources, such as mobile devices, high-end scanning devices, Multi-Function Peripherals (MFPs), file system folders and email servers, as well as from authoring tools, like Outlook, Word and Excel, among others.

Content classification and indexing also are key components. Oftentimes, **confused hierarchy structures and poor labeling causes loss of or erroneous changes to vital business documents** .

Metadata helps to describe the content managed by ECM. It is useful in many situations, such as discovery, validation, organization, storage, delivery, retrieval and also deletion of content.

**Efficient capture and classification add value to the content, saving time and resulting in an organized and functional repository.**

A well-defined indexing strategy is crucial for efficient document retrieval. Users will be able to instantly get access to the documents they need.

## 02 | Store

When users click on the "save" button in their productivity tools, where do their files go? There are still organizations today where users save strategic documents on hard drives, keeping data and information private and quite vulnerable to theft, loss or equipment failure.

The main purpose of storing, is to quickly find information when needed. Today's people want to find business documents simply, as if they were searching for a video online.

**Storing content between local folders, emails and network sharing make it difficult to find things and make business processes less efficient and more expensive.**

ECM helps companies to achieve centralized storage of business content and is critical to business security and compliance.

When users click on the "save" button, **ECM allows the document to be sent directly to a single source of information**, where organizations can consolidate all of their important content.

Content that is quickly available typically results in increased productivity and efficiency in the business process.





## 03 | Manage

The real value of ECM should go way beyond simple capturing, storing and delivering. ECM encompasses security controls, collaboration capabilities, and more.

Organizations have begun to take content security very seriously so as to deal with the ever-increasing risks of business information being used improperly, inadvertently leaked or stolen.

For industries where auditing and compliance are a concern, ECM helps to promote transparency.

Overall, all documents go through a sequence of steps during their lifecycle. It all begins when a draft document is created, which is then circulated for review and later approved and published.

Managing these tasks without ECM is often cumbersome. **ECM promotes collaboration through workflow and is the element that gives life to the content, making these tasks simplified.**

Workflow also allows for validation, enabling users to review, comment on and discuss content to keep the right people involved in the process.

**By securely managing content, organizations can improve regulatory compliance and security, while also reducing costs.**

## 04 | Preserve

Regulations, sanctions and fines are increasingly on the rise. Dealing with them is a challenge for various industries and the **risk associated with inadequate archiving of enterprise content is concerning to executives.**

Most of enterprise documents have a lifespan that can be defined by corporate policies or compliance requirements and laws specific to each country. If a company needs to comply with a law by keeping employee documentation for ten years, it needs to **ensure that this documentation will not be eliminated before this retention time is met.**

Without a retention strategy, companies will need to deal with unreasonable storage costs and will waste significant time sifting through large amounts of data.

Poorly classified and poorly disposed content can be seen as an attempt to shirk compliance. Courts don't accept the justification that corporate policies were wrongly or mistakenly applied and penalties can be harsh.

Companies need to prove their compliance with regulations through audits and regular reporting. Enterprise retention strategies must factor in the nature and frequency of these compliance mandates.





## 05 | Deliver

Many organizations have no idea **how much time their employees lose looking for important documents, spread between islands of information.** Without information, companies cannot serve their customers.

Instead of network folders, ECM has a more robust set of capabilities for delivering content.

ECM as a single source of corporate content **streamlines and shortens the path between content and the interested parts.**

Through this element, ECM delivers relevant information, guiding people to the right decisions. It also promotes collaboration and allows business process to flow faster.

Growing compliance and legal requirements require delivery of the right content to the right people at the right time. This is particularly critical for highly-regulated industries like pharmaceuticals, energy and financial.




Now that you already know **5 strategic processes for ECM success**, learn more about the most complete and innovative solution on the market for process automation and improvement, regulatory compliance and excellence in content management



## SoftExpert ECM

SoftExpert ECM (Enterprise Content Management) is a software that provides all of the core content management services needed to create, capture, manage, store, preserve, and deliver content related to organizational processes. It is a practical software solution for centralizing unstructured content and better managing the entire content lifecycle.

SoftExpert content management software provides a set of enterprise content management capabilities including a platform to tie capture, document and record management, workflows, search and archiving as well as applications, such as contract management and engineering document management system (EDMS), all integrated into a single web-based platform.



# Document imaging and OCR

SoftExpert Capture

ID # 000021 Title 12/04/2014 Purchase Order Lang Sterling Pie Server

000021 - 12/04/2014 Purchase Order Lang Sterling Pie Server

P040669 - Purchase Order Lang Sterling Pie Server

Document category:

Document ID #: P040669

Document title: Purchase Order Lang Sterling Pie Server

Index Value

- PO# 638
- Sales Representative Northwest Products
- Customer Name MARTIN
- Customer Last Name JANEWAY
- Customer Address 19 POWERS ROAD
- City MANHEIM
- State IL

Ordered By: Bill Slater  
365 Planter Street  
New York, NY 07326

Ship To:

First Name MARTIN Last Name JANEWAY

Address 19 POWERS ROAD

City MANHEIM State IL Zip/Postal Code 60420

Country USA

Quantity	Item #	Description	Unit Price	Amount
1	638	LANG STERLING PIE SERVER	34.95	34.95

Updated by Tetrus Kendo Created on 12/04/2012 Last updated 08/04/2014

Document data > PA-100115-CEA LOGISTICS INTERNATIONAL - CEA Logistics International - ASIA/OCEANIA Distribution

Record

Save & exit Save & new

General data Revision Structure Electronic file Physical record Printed copy

Attributes

Contract Signature Date 23/02/2014

Contract Number 100115

Customer CEA Logistics International

Customer Address 71 Elisabeth II Av., Melbourne / Bourke County / 10321-25 / Australia

Contract General Description This agreement defines how Retail Products and CEA Logistics will make their distribution and delivery services in ASIA and Oceania countries.

Automatic Renewal No

Contract Manager Jack Hughes

Customer's Contract Manager Ms. Jillian Watson

Contract Written Price two million, eight hundred thousand, sixty nine United States dollar

Contract Price

Currency US\$2 800 069.00

PDF Viewer

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Save as... Print Zoom In Zoom Out Best Fit Fit width Rotate 90° Rotate 180° Send by mail Search Page

File

FORM OF SUPPLY CONTRACT AGREEMENT

Code	Revision	Responsible	Retained Date	Pages
PA-100115-CEA LOGISTICS INTERNATIONAL	01		12/03/2014	1 of 4

CONTRACT AGREEMENT

Contract Number: 100115  
Contract Manager: Jack Hughes

THIS AGREEMENT, made as of 20/03/2009 is

BY AND BETWEEN

the CUSTOMER (CEA Logistics International, 71 Elisabeth II Av., Melbourne / Bourke County / 10321-25 / Australia)

And the SUPPLIER: Retail Products Inc, 64 Kennedy Ave., Chicago / Illinois / 60662.

CONTRACT ABSTRACT:

This agreement defines how Retail Products and CEA Logistics will make their distribution and delivery services in ASIA and Oceania countries.

WITNESSETH:

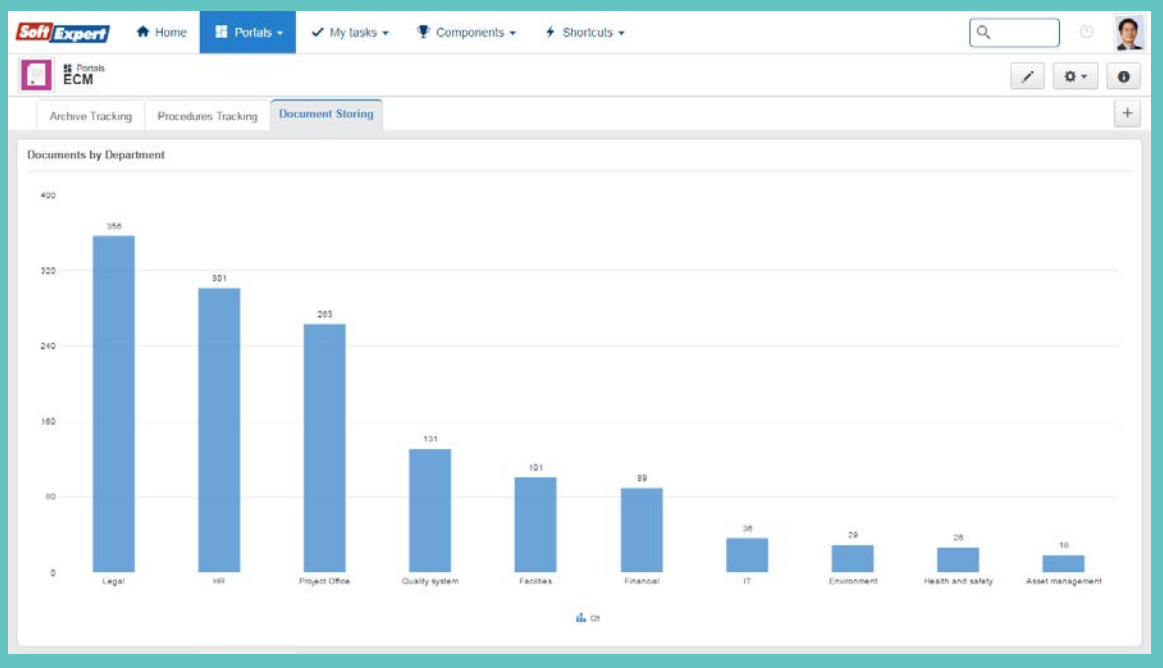
NOW THEREFORE in consideration of the mutual covenants hereinafter set forth, CUSTOMER and SUPPLIER agree as follows:

Article 1 - Work

It is hereby mutually agreed that for and in consideration of the payments as provided for herein to the SUPPLIER by the CUSTOMER, SUPPLIER shall faithfully furnish all necessary labor, equipment, and material and shall fully perform all necessary work to complete the Project in strict accordance with this Contract Agreement and the Contract Documents.

# Document indexing

# Document categories

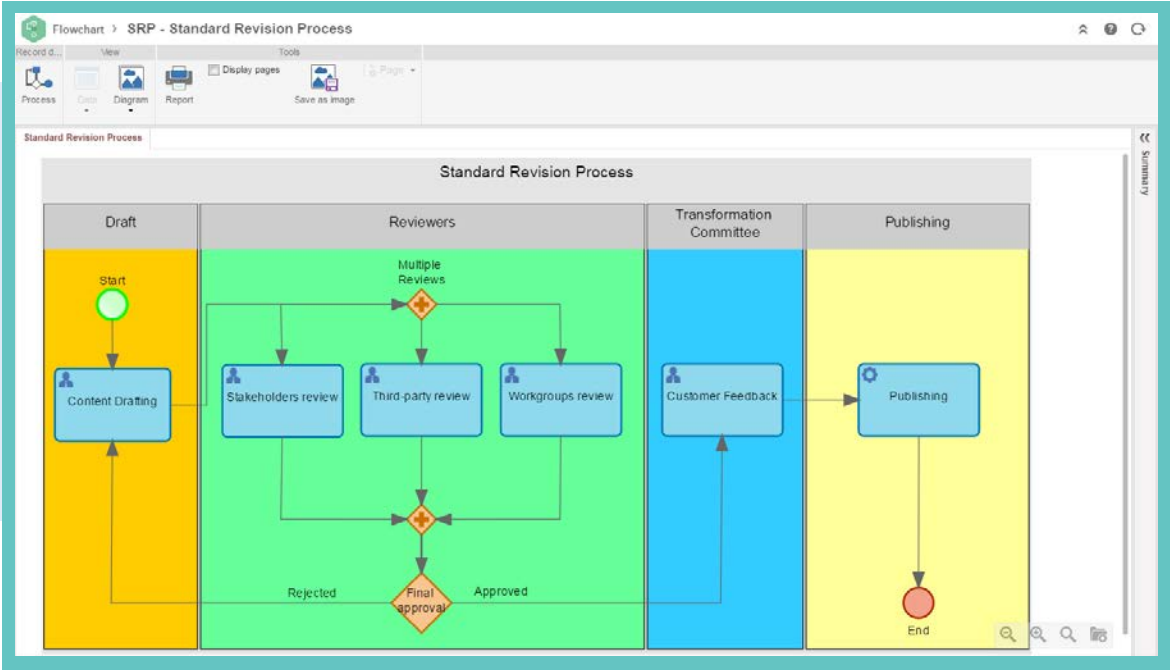
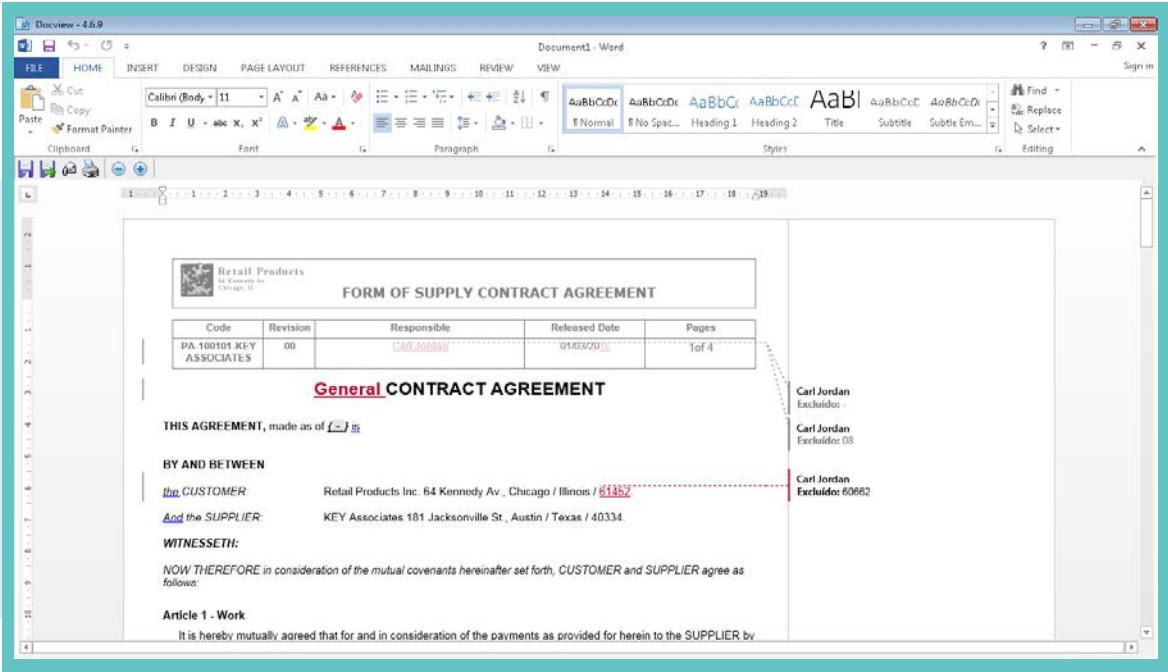


The screenshot shows the "File Repository (AR004)" view in the SoftExpert ECM system. It includes a search filter sidebar on the left and a main table listing repository details. The table has columns for ID #, Name, Storage place, Department, and Capacity. The data is as follows:

ID #	Name	Storage place	Department	Capacity
26	Box 01	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Full
27	Box 02	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Full
28	Box 03	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Full
29	Box 04	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Full
30	Box 05	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Empty
31	Box 06	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Empty
32	Box 08	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Empty
33	Box 09	Document storeroom - 1st floor:Sliding file cabinet 01 (SFC01)	Legal	Empty
34	Box 10	Document storeroom - 1st floor:Sliding file cabinet 02 (SFC02)	Legal	Empty
35	Box 11	Document storeroom - 1st floor:Sliding file cabinet 02 (SFC02)	Legal	Empty
36	Box 12	Document storeroom - 1st floor:Sliding file cabinet 02 (SFC02)	Legal	Empty
37	Box 13	Document storeroom - 1st floor:Sliding file cabinet 02 (SFC02)	Legal	Empty
38	Box 14	Document storeroom - 1st floor:Sliding file cabinet 02 (SFC02)	Legal	Empty

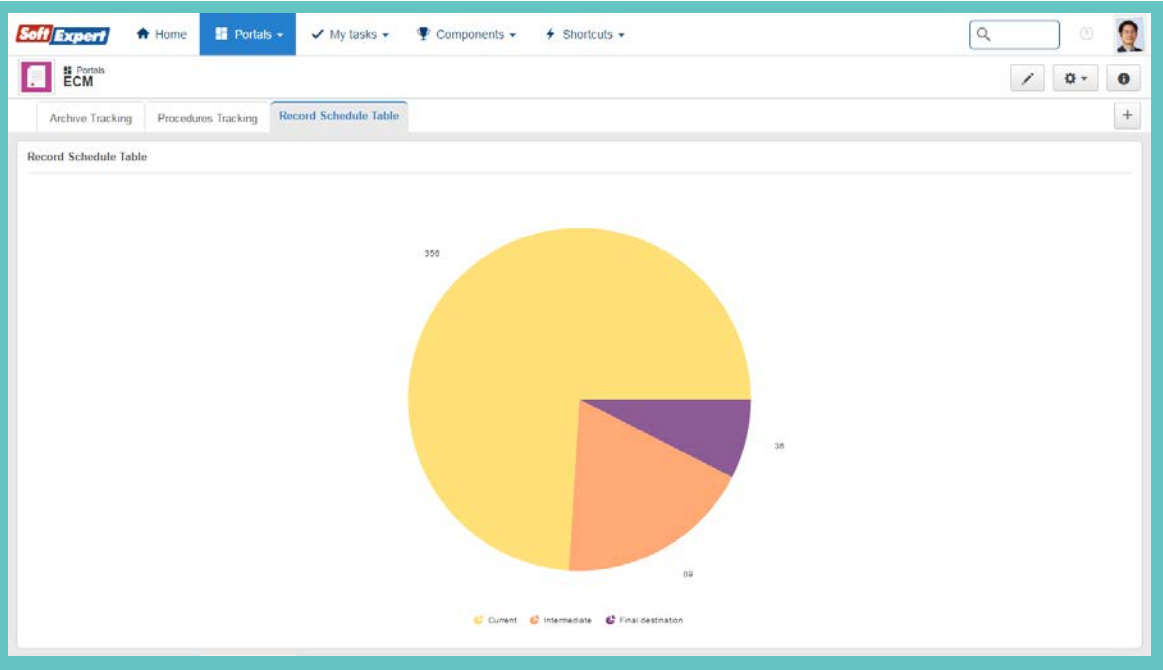
# Physical file repositories

# Document-centric workflows



# Document review

# Record schedule table



Soft Expert System auditing (DC027)

H	Date	Time	Category	ID #	Title	Revision	User	Host	IP	Department
	18/05/2015	14:35:34	MAN	MN000004	Quality Manual - TT Electronics	00	Robert Smith	192.168.8.66	192.168.8.66	PMO
	20/05/2015	14:03:56	MAN	MN000001	Quality Manual		Smith	192.168.6.66	192.168.6.66	PMO
	22/05/2015	17:34:13	CAD	CAD001A3	Floor Plans		Kendo	192.168.1.28	192.168.1.28	Information Technology
	26/05/2015	15:50:16	CAD	CPR005A3	Foundation Plan		Smith	192.168.1.6	192.168.1.6	PMO
	26/05/2015	15:59:42	E	ED000001	QCPP REQUIREMENTS		Smith	192.168.1.6	192.168.1.6	PMO
	26/05/2015	16:05:40	CAD	CPR004A3	Exterior Details		Smith	192.168.1.6	192.168.1.6	PMO
	26/05/2015	16:06:24	CAD	CPR005A3	Foundation Plan		Smith	192.168.1.6	192.168.1.6	PMO
	27/05/2015	09:42:57	MKT-PPT	MKT-PPT000002	EnMS Policy		Smith	172.16.31.255	172.16.31.255	PMO
	27/05/2015	09:42:57	MKT-PPT	MKT-PPT000002	EnMS Policy		Smith	172.16.31.255	172.16.31.255	PMO
	27/05/2015	09:42:57	MKT-PPT	MKT-PPT000002	EnMS Policy		Smith	172.16.31.255	172.16.31.255	PMO
	27/05/2015	09:43:46	MKT-PPT	MKT-PPT000002	EnMS Policy		Smith	192.168.1.6	192.168.1.6	PMO
	27/05/2015	09:48:30	CAD	CAD001A4	8-DIRECTION MILL Assembled Model		Smith	192.168.1.6	192.168.1.6	PMO
	27/05/2015	09:48:57	CAD	CAD001A4	8-DIRECTION MILL Assembled Model	00	Robert Smith	192.168.1.6	192.168.1.6	PMO

Legend - Google Chrome

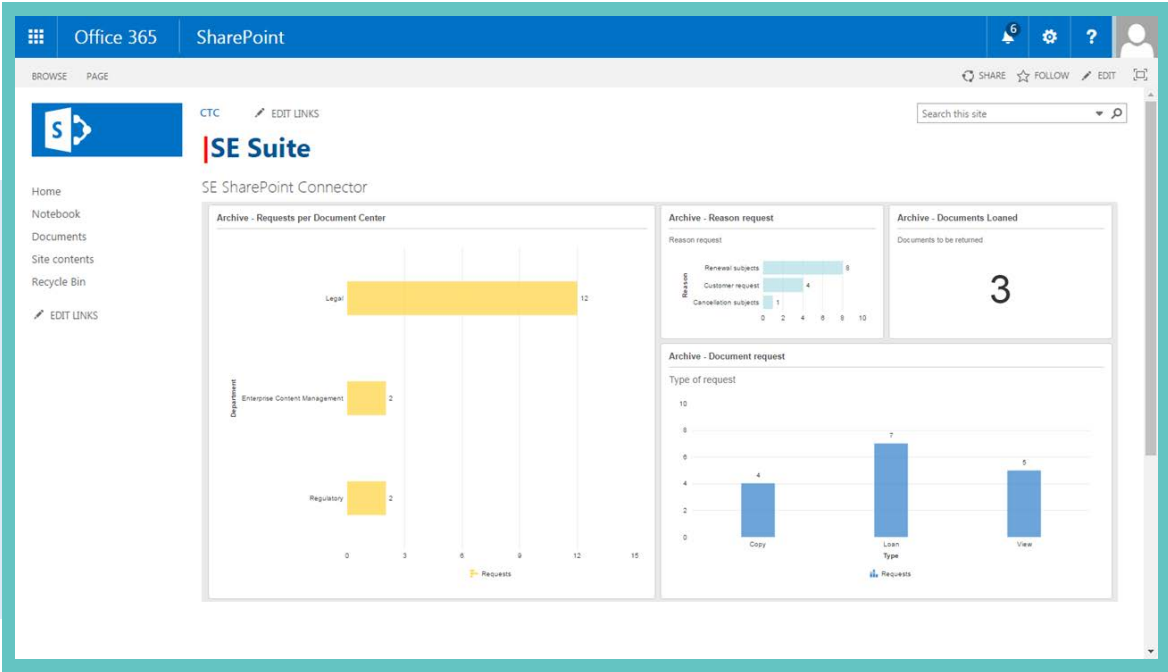
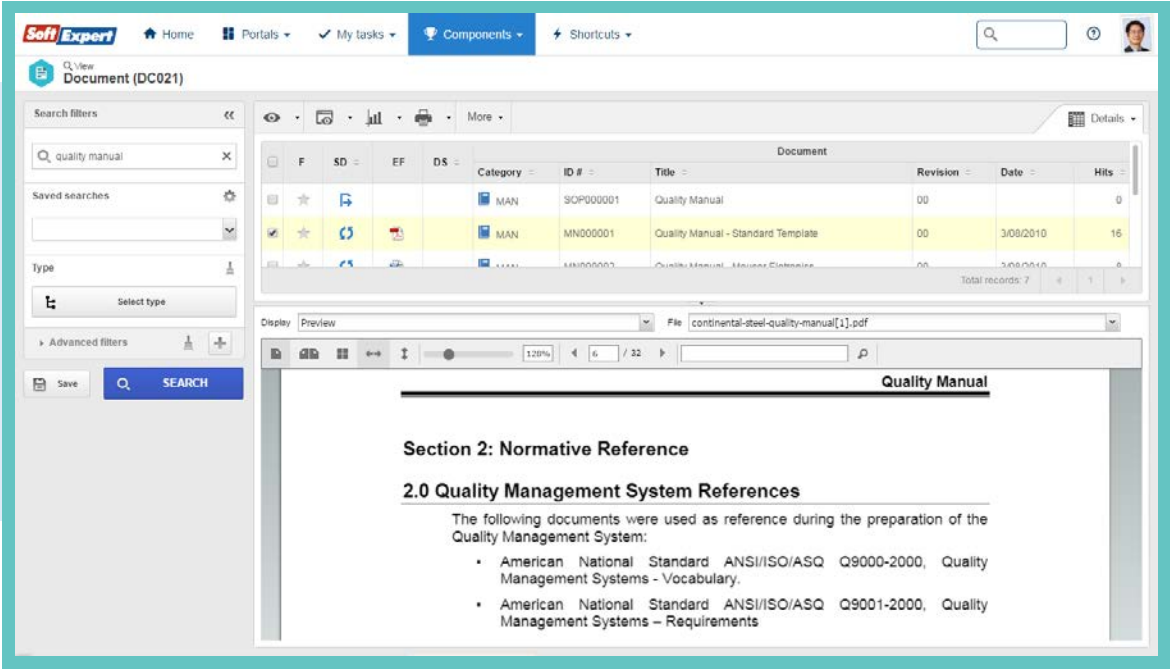
- Registered document
- Deleted document
- Canceled document
- Released document
- Registered revision
- Deleted revision
- Closed revision
- View document
- Add electronic file
- Delete electronic file
- Printed controlled copy
- Printed uncontrolled copy
- Quantity of scheduled copies was modified
- Registered archiving
- Canceled archiving
- Digital signature

Total records: 7902

# Audit trail



# Document viewing



# Microsoft SharePoint integration

## SoftExpert Excellence Suite



SoftExpert Excellence Suite is the most comprehensive framework of independent yet united solutions to achieve business performance excellence, streamline corporate governance, risk and compliance programs, and ensure continuous business process improvement.

Companies may not need all applications at once, or may want to deploy one application module at a time, growing gradually as the need arises. Whatever the strategy chosen, only a fully shared environment allows its applications to fit together like puzzle pieces and work seamlessly.

## About SoftExpert

SoftExpert is a market leader in software and services for enterprise-wide business process improvement and compliance management, providing the most comprehensive application suite to empower organizations to increase business performance at all levels and to maximize industry-mandated compliance and corporate governance programs.

Founded in 1995 and currently with more than 2,000 customers and 300,000 users worldwide, SoftExpert solutions are used by leading corporations in all kinds of industries, including manufacturing, automotive, life sciences, food and beverage, mining and metals, oil and gas, high-tech and IT, energy and utilities, government and public sector, financial services, transportation and logistics, healthcare, and many others.

SoftExpert, along with its extensive network of international partners, provides hosting, implementation, post-sales support and validation services for all solutions to ensure that customers get the maximum value from their investments.



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