



Document  
management  
and workflow  
automation



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## Digital transformation is changing everything

We send email instead of letters, book our vacations online, and store pictures in the cloud ... all while streaming our favorite music.

Video calls have replaced on-site meetings, your taxi arrives via an app, and almost any food can be delivered within minutes.

It's all digital.

Digitization is shaping the way we work, and it's accelerating our lives in the 21st century. It is disrupting traditional models, yet opens new customer experiences and revolutionizes how we do business.

All industries are realizing the opportunities available with digital transformation.

But it's not always obvious how to start. This is where DocuWare can help.

## It starts with document management and workflow automation

How does the reality in most offices look today?

Employees are overloaded with tasks. There's too much paper. Security, data privacy and compliance are permanently at stake. Information for decision-making is not quickly or easily accessible. Customer service suffers. Innovation is impeded.

To keep pace with the modern world, teams require truly streamlined processes. Document management and workflow automation are simple, visible, meaningful steps for launching your organization – whether a small department or an entire enterprise – into digital transformation.

Scalable cloud technology, always-available information and digital workflow are all part of the plan that productive companies follow to maximize revenue growth, build the skills of their employees and ensure a future-ready business.

# Strategies to become an agile business

As your organization embraces digital transformation, there are practical strategies that accelerate your evolution.

Going paperless is the start, but embracing automation, mobility and compliance delivers true agility. And cloud-delivered technology unlocks entirely new capabilities for using business information.



## Farewell to paper

### Your first step as a digital organization

Paper slows work down, is easily lost, and can add up to a big expense. Have you ever calculated how much time and money is spent on copies, printing, filing cabinets ... not to mention unproductive searches?

Modern organizations eliminate physical archives and paper-based processes to save cost and time – and to protect valuable corporate knowledge. Digital document management maintains your data in a structured and secure way.

When digitized information is served up quickly and accurately, you and your team can work with peak efficiency.



## Automated processes

### Time better spent benefits everyone

Tedious and routine tasks such as data entry and comparison, information sharing, and correcting mistakes consume valuable resources that could be better utilized by your sales, accounting and HR teams.

There is enormous potential in automating tasks. Processes like invoice processing, employee onboarding and contract management have numerous steps and decision points that can be digitized and automated. Employees focus on decision making, not moving paper.

Free up your employees from frustrating and time-wasting manual work – and make way for them to use their talents, expertise and customer service skills instead.



## Mobile employees

### Information beyond the office walls

Whether in a home office or in an airport: the modern workplace is mobile. Work now happens outside the walls of a traditional office. Agile, digital businesses thrive with a flexible, mobile workforce and embrace the anytime, anywhere, any-device model of productivity.

Starting, advancing and completing workflows right from a mobile device keeps information flow smooth. Accessing key sales, marketing or financial information right when it's needed ensures confidence with customers, partners and prospects.



## Strategic compliance

### Meeting regulations is just the start

From the correct handling of tax-relevant documents to the protection of sensitive personnel documents, compliance requirements pose significant challenges for management and employees.

Regulations like HIPAA, GDPR, Sarbanes-Oxley as well as internal policies should not slow you down. In fact, strategic information management that comes from meeting these laws strengthens your competitiveness.

Use them to your advantage. Shore up security, transparency and data protection so that everyone benefits – your team, your organization and your customers.



## The flexibility of the cloud

### Your key to digital transformation

For decades, enterprise IT was delivered through cumbersome on-premises systems. It was costly and time-consuming to install software, manage system updates and safely archive data.

Cloud-delivered software changes the game completely. Business leaders have an entirely new means of accessing sophisticated, affordable solutions. It has never been easier to equip employees with highly usable tools, integrate systems and scale storage as your business grows.

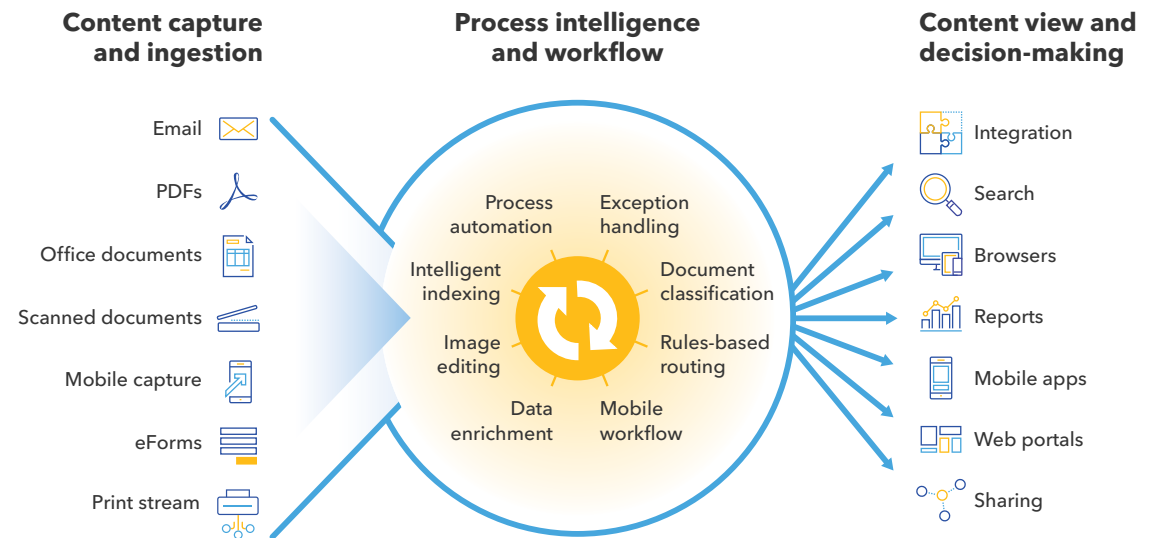


# Your platform for productivity

Successful digitization depends on how well information flows between colleagues, teams and organization.

DocuWare is a document management and workflow automation platform that empowers you to capture, process and use your business information. Boost your productivity, secure your information, and launch into digital transformation with confidence.

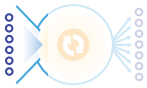
DocuWare offers comprehensive tools to connect information, processes and decisions. Employee focus can shift from routine manual activities to more innovative, knowledge-based tasks.



“By using DocuWare, we now have a completely digital workflow for our documents. This creates transparency and gives our customers and employees comprehensive search options that they can access from anywhere. The easy and flexible integration of DocuWare into our business applications was critical for us. Our operational business processes are now faster, safer and closer to our customers.”

Dr. Frank A. Trotz  
PRESIDENT, LEVERDY GMBH & CO. KG

# With DocuWare, you can:



## Capture and organize information

### Keep documents secure and findable

Bring together scanned documents, files created in any program, emails and their attachments, data captured online, and documents captured via mobile devices. Archive it all in a secure and searchable digital repository.

Any business document is welcome: invoices and delivery notes, applicant resumes and payroll stubs, or project-related plans and log reports. Automated indexing identifies key information for ultra-efficient organization and retrieval, enabling your team to find information, use it, and keep it securely archived.



## Manage workflow and automate manual steps

### Keep processes running smoothly

Simplify and accelerate document-related tasks with the help of automated workflow. Determine processing steps, easily adapt them to changing requirements, and react immediately to exceptions.

Incoming documents or a change in status immediately trigger process steps, and these events link together into fast, digital workflows. Transparency allows management to monitor progress.

For example, a newly captured invoice is instantly routed for approval, the approved invoice is then booked and prepared for payment. An automatic data comparison with the ERP completes the indexing. No manual data entry, no searching, no waiting.



## Retrieve information and make smarter decisions

### Use your information as it was intended

Empower your team to make faster, more informed decisions. With DocuWare, all information about a customer, a project or a business process is seconds away.

Access your information instantly from any browser or mobile device; link your content to records inside your ERP, CRM or HCM to provide additional business context; share documents inside a web portal or directly with colleagues. Decisions happen across a range of contexts, and DocuWare ensures your information is right there.

# Solutions for your department

Get a head start with digitization. With our solutions, teams from any department in any industry can work more closely and effectively together.

Use DocuWare throughout your business and combine it with any other application to automate routine operations, link together information silos and accelerate decisions.

## Accounting and finance

**Streamlined processes mean the best numbers for the entire finance team**



“When making business decisions, our management team needs clear insight into all financial data. DocuWare gives me the certainty that our core financial processes are quick and accurate.”

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Director of Finance

Rev up your accounting department. Capture invoices without delay, automatically link related orders, and enjoy a smooth approval process to keep things under control at every point along the way.

Gain real-time insight into your financial data by integrating document information from accounts payable, accounts receivable and other teams directly into your ERP. Simplify audit preparation when all documents are structured and every business transaction is traceable.

- Fast, accurate, AI-based indexing ensures data integrity in all captured documents
- ERP integration for data comparison and direct invoice access
- Secure audit management and fraud prevention



## Sales and customer service

### Targeted pitches and best possible service



"I often have to quickly get caught up on customer projects and decide on an ad hoc basis how to proceed. With DocuWare, I am prepared for any eventuality and can deliver the right answers immediately."

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Sales Professional

Ensure all customer records and product information are available on your sales team's mobile devices. Give them insight into contracts, correspondence and status changes at any time, so they're always up to speed when it comes to their prospects and customers.

Empower your service team to capture order data on-the-go and automatically forward it to the back office. Deliver outstanding customer support. When everyone is working with the same information, process gaps disappear, and no one is wasting time looking for documents.

- Secure access to sales information – anywhere, any time, any device
- Mobile scanning and data capture via web form
- Automated order processing

## Human resources

### Simplified, modern employee management



"Our employees gain insight into their work environment right from the start. DocuWare simplifies recruiting, onboarding and employee management. I'm free to respond more individually and personally to questions and requests."

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Human Resources Professional

Strengthen your business through automated HR processes. Attract qualified employees faster and ensure a smooth start.

Digitize personnel files with modern tools for filling out forms, managing absences, and protecting your employees with guaranteed confidential data.

- Simple data capture and form management
- Faster and more secure access to personnel files via mobile device or directly out of your HCM
- Workflows ready for onboarding, time-off applications and much more

# Modern cloud technology

Office automation gives you the freedom to focus on growth and innovation. This is further accelerated with cloud technology.

Take advantage of future-proof solutions that scale with your growth, secure your information, integrate with your technology stack, and deliver high usability to employees.

# DocuWare Cloud

## Complete feature set, delivered as a cloud service

DocuWare Cloud provides all of the features and capabilities of a traditional on-premises solution but with more financial and system flexibility.

Built on Microsoft Azure cloud infrastructure, DocuWare Cloud's powerful multitenant architecture guarantees maximum security and availability. Data is stored and triple-mirrored with AES encryption in data centers in the EU or U.S.

And whether you're a small team or a large business: take advantage of a licensing model that suits organization where you can expand storage and users as needed.

| Capability   | Cloud | On-premises           |
|--|-------|-----------------------|
| Basic capture (scan, import, capture print stream)                   | ✓     | ✓                     |
| Advanced capture (web forms, email integration, mobile)              | ✓     | + Additional licenses |
| Intelligent Indexing and document classification                     | ✓     | + Additional licenses |
| Basic document control (versioning, search, non-destructive editing) | ✓     | ✓                     |
| Process automation and task management                               | ✓     | + Additional licenses |
| External sharing   | ✓     | ✓                     |
| URL and programmatic integration (for ERP, CRM)                      | ✓     | ✓                     |
| Microsoft Outlook integration  | ✓     | + Additional license  |
| MFP integration  | ✓     | + Additional license  |

## Preconfigured cloud solutions

### Boost productivity from day one

Office automation does not need to be a long, difficult project. Transformation from manual processes to digital workflow does not require enormous amounts of time and complex IT skills.

The productivity and effectiveness of central business processes such as invoice processing and employee management can be accelerated in days and without high investments. This is made possible through our preconfigured cloud solutions.



Business processes across organizations share many key actions and requirements. Preconfigured DocuWare cloud solutions provide templates for document capture, workflows, exception rules, user profiles and more.

- Simplify the financial and technical on-ramp with a secure, multitenant SaaS environment
- Automate invoice processing and other key processes based on best practices honed from thousands of deployments
- Skip the complicated and time-consuming phase of process mapping and configuration
- Tweak user profiles, archive structures, tasks and forms to meet your team's needs
- Seamlessly integrate with other key systems like ERP, CRM and HCM

DocuWare preconfigured solutions are based on 30 years of understanding customer needs, thousands of successful digital transformations and technology that is innovative and offers the highest levels of data security. With each preconfigured cloud solution customers receive the full scope of DocuWare Cloud services.

"DocuWare was easy to implement and a breeze to get up and running. Part of the reason we choose this solution was because updates are automatic and software support is readily available."

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Mona Dinnauer

OUTREACH LAB MANAGER, MERCY MEDICAL CENTER LABORATORY

# Integration, security and compliance

Document management and workflow automation are even more powerful and beneficial when documents and business information flow seamlessly between applications.

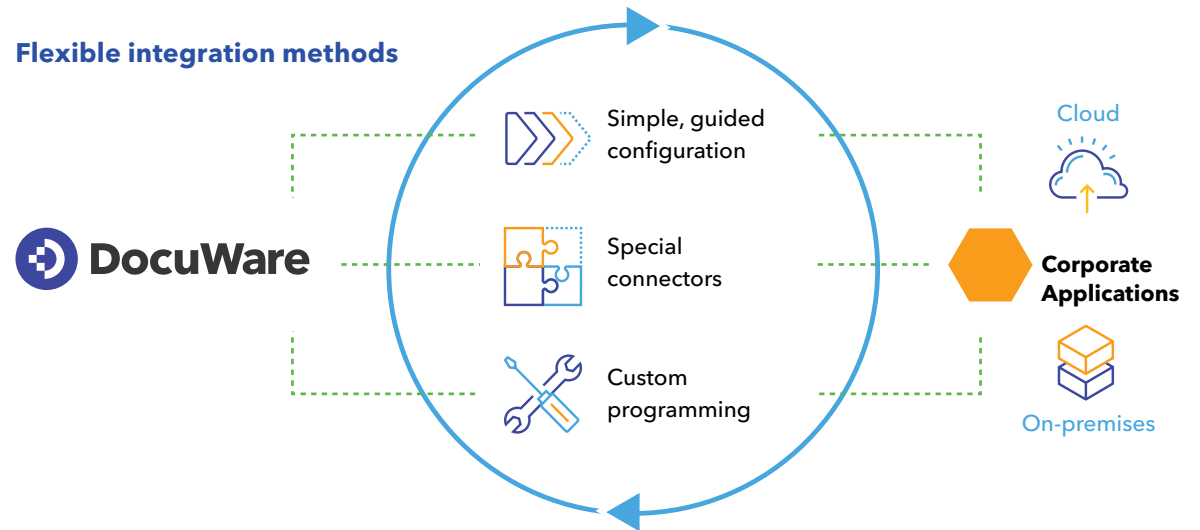
Extend this value by ensuring compliance with critical regulatory standards and securing information so only authorized individuals can access sensitive business data.

## Establish a seamless flow of information

For synchronized archiving, end-to-end workflow and smarter decision making, DocuWare integrates into almost any business application. The platform also links to key business hardware like multifunction devices to convert paper documents into intelligent, usable information. For example:

| Email   | Invoices   | Contracts   | Collaboration   | HR   |
|---|--|---|---|--|
| Securely archive email right from Microsoft Outlook | Post processed invoice data back to Sage, QuickBooks, SAP or other ERP | Link contracts back to records within Microsoft Dynamics or other CRM | Extend collaboration tools like SharePoint with document management | Route scanned documents into a secure, centralized employee record |

### Flexible integration methods



*In order to connect information and applications, DocuWare offers extremely flexible integration options. These work when communicating with cloud services as well as locally installed software. You can easily embed elements like a search field or result list by adding a URL link in your application. DocuWare also offers high-performance connector modules for SAP, Outlook or SharePoint.*

## Protect company information and support compliance



### Legally secure storage and processes

Digitization with DocuWare stands for traceability and transparency: the immediate storage of business-critical documents is guaranteed. Gain full control over document versions and deadlines. Protect yourself against fraud through well-regulated workflows. And make sure processes never get delayed or interrupted.



### Protect against data misuse

Access to documents and workflow information in DocuWare is based on a sophisticated rights system: you control exactly which users are able to store, retrieve, edit, export, change and delete information. It's even possible to further encrypt particularly sensitive data that even a system administrator cannot access.



### Recovery from natural disaster

Protect your documents from loss regardless of what happens in the world. Every level of DocuWare is secure. Multiple redundant backups provide business continuity. Even in a worst case scenario, your data and documents can be restored.



### Complete compliance support

DocuWare brings clarity and continuity to your business processes and supports your efforts to meet HIPAA, Sarbanes-Oxley, GDPR or other regulatory guidelines.

"DocuWare has given us peace of mind regarding the management and security of our electronic documents, alerts and reports. Additionally, we are very happy with the integration between DocuWare and our internal systems, which allows us to quickly and easily share documents without duplicating information."

Daniel Arzamendia  
OPERATIONS AND SYSTEMS MANAGER, BACS ARGENTINA

**GDPR, or General Data Protection Regulation**, is obligatory for European companies and any company doing business in Europe or with European customers. The regulation gives customers the power to control the transfer of their own information and imposes significant penalties for non-compliance.

Document management and workflow automation play a key role in complying with GDPR. Using DocuWare, your company gains the ability to locate and access personal data stored in and processed with your documents; export, correct and delete personal data; and ensure that personal data is protected and not processed further.

# Customer success stories

Respond faster. Grow revenue. Meet compliance.

We understand the goals and needs of modern companies and their employees. For more than 30 years, we've helped thousands of organizations transition from paper-based, manual processes to digital, automated workflows.

DocuWare is used in 90 countries across 16 languages by more than 12,000 organizations.

*U.S. Service Provider*

## LGC Hospitality

### Onboarding employees with ease

LGC Hospitality is a leading hospitality staffing company with over 26 offices across the U.S. They process paperwork for over 50,000 applicants a year and issue W2 forms to over 24,000 employees. Before DocuWare, the application process could take up to 90 minutes; now it only takes about 30.

"DocuWare has significantly impacted our business and streamlined our processes. Our onboarding procedure is considerably easier and quicker for both applicants and staff and the use of online web forms results in complete, accurate information. On a corporate level, we have access to all the documents from each of our 26 locations, streamlining our audit process and improving our efficiency. DocuWare has helped us move our business into the modern age and allowed us to better serve our clients."

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Rachel Martin  
VP OF OPERATIONS, LGC HOSPITALITY

*Germany, Food Manufacturer*

## HARIBO

### Sweet paperless workflows

Tedious business processes that rely on bulky files and binders are a thing of the past at HARIBO. This long-established company located in Germany depends on DocuWare for super-fast document retrieval.

By turning to this integrated document management solution, the company was able to streamline its processes and improve its customer service worldwide.

"DocuWare is the cornerstone of our IT strategy, helping us to integrate software applications from all of our offices around the world as well as shrinking costs and simplifying the exchange of communications."

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Rainer Heisel  
DIRECTOR IT / ORGANIZATION, HARIBO GMBH & CO. KG



*U.S. Sports Equipment Manufacturer*

## Rawlings Sporting Goods

### Scoring big with DocuWare Cloud

Rawlings Sporting Goods, a leading manufacturer and marketer of sporting goods in the United States, implemented DocuWare Cloud to improve information sharing and communication with its vendors worldwide.

The company sped up its production through business process automation, raised the quality of customer interactions, and improved customer service and vendor relations.

"The information in DocuWare raises the quality of our customer interaction and allows us to respond faster. I can't tell you how much help it is to be able to search for information in more than one way."

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**Sally Vandegrift Yeast**  
VICE PRESIDENT, CUSTOMER EXPERIENCE & ANALYTICS,  
RAWLINGS SPORTING GOODS COMPANY, INC.

*U.S. Manufacturer*

## Criterion Tool & Die Inc.

### Digitizing years of paper documents

Criterion Tool & Die Inc. manufactures precise components for no-failure industries such as medical, airspace and photonics. Government regulations mandate that Criterion Tool & Die Inc. retains documentation on parts supplied for the lifetime of the products and instruments. The company must produce this documentation in a timely manner for audits. After considering several document management solutions DocuWare was chosen. The company purchased its own servers and is currently maintaining 16,500 documents.

"DocuWare saves us time, money and reduces stress during preparations for audits." says Gottschalk. The company plans to start using the new Process Planner workflow tool in the near future. "DocuWare really became part of the fabric of how we operate here."

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**Kellyanne Gottschalk**  
MARKETING & IT COORDINATOR

*United Kingdom, Transportation Expert*

## Contract Vehicles Limited

### Faster processes for a fleet of 12,000

Managing a fleet to be cost effective and resource efficient requires smart organizational structures. Contract Vehicles Limited specialize in providing commercial vehicle contract hire and fleet management solutions for over 12,000 vehicles for high-profile customers in the UK and Ireland.

With electronic document management, the company was able to significantly reduce their enormous paper volume and improve business processes to be faster, more transparent and customer-friendly.

"With DocuWare, we were able to replace paper-based, error-prone work through automated, digital processes. Employees and customers benefit at the same time through higher efficiency and improved service levels."

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**Geoff Swaby**  
IT-MANAGER, CONTRACT VEHICLES LTD.



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