

## 5 Steps For Integrating ECM Into Your Organization



While today's enterprise content management (ECM) tools offer a great value to businesses, many companies miss out on the technology's true potential. When your ECM platform is fully integrated with your existing systems, tools and workflows, it delivers important benefits for your organization, your employees and your bottom line.

In terms of human resources, this type of integration helps drive user adoption and greater employee productivity. From a technology perspective, integrating ECM improves your data integrity and accuracy and helps you get more use from your existing IT assets and hardware investments. When ECM is connecting your business systems and your personnel, it allows you to unlock their true potential.

That sounds good, but how does your company get started?

Here are five major elements that should be part of your integration process:

### 1 Integrate ECM into line-of-business applications

Whether it's an accounting package or a CRM, your personnel probably do much of their work within these traditional line-of-business applications. Periodically, these users have to leave an application and go hunting for digital or paper files stored elsewhere, disrupting the workflow.

### Integration Has Benefits

Connect ECM with your business systems and personnel to unlock their true potential and positively influence your bottom line.

By integrating ECM, you don't have to leave the application or switch windows to track down a related document. Advanced ECM solutions allow you to place a button within your applications and the documents related to the content on your screen pop up automatically when clicking that button.

### 2 Integrate ECM with your email system

This integration spans all departments and serves two purposes: instant retrieval and automated archiving. Imagine you're reading in Outlook or another mail client and want to quickly check a document that's related to that email before responding. Instead of going to a physical file cabinet or searching through your digital files, integrating ECM with your email system allows you to instantly search and retrieve any document in your system, without leaving your inbox.

Automated archiving is a second benefit of this integration. Email is a notorious data silo for most organizations: Once information goes into an employee's account, it's not searchable or useable by others in the organization. ECM makes it easy to archive any incoming or outgoing email and file it in your central document repository.

### 3 Synchronize data flow in and out

When you start using ECM to store and index documents in a central repository, you don't want to create additional data entry work for your employees. Rather than manually filling out index fields every time you file a document, integrating your systems allows you to reuse data that's already available in your organization.

When you've integrated ECM with your existing databases and other sources, the ECM system is able to automatically extract any indexing information in existing databases and use it to store your documents. This minimizes the need for manual data entry in indexing, and also improves the quality and consistency of your data.

At the same time, information you gather in an ECM system may also be exported to other databases. If you index accounting records and invoice records in the ECM, for example, you could then make that data available to the accounting system.

### 4 Enable mobile access

Here, the goal is to integrate your ECM with all of your company's existing mobile devices so that users have access to important business documents from their laptops, tablets, smartphones and other devices. This anywhere, anytime access helps employees to maximize efficiency and productivity instead of having to wait until

they return to the office to find a document. This enables users to work smarter and more efficiently.

### 5 Connect existing input devices to ECM

Take note of any hardware you're currently using to capture physical documents, such as a scanner or multi-function printers (MFPs). By bringing an ECM solution online, you're getting additional functionality from these devices, using them as an on-ramp into your ECM.

Following these five integration steps ensures that you get the most from your ECM investment as well as your existing business systems and devices. By driving user adoption and improving data accuracy and integrity, an integrated ECM solution helps create synergy within your organization, improving efficiency and productivity.

## Ready to learn more about streamlining your workflow processes with ECM?

Contact DocuWare today for a free, no-obligation consultation. It includes a comprehensive cost-benefit analysis and a success roadmap to ensure optimum results.

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