# Interview with "Der Prozessmanager"

**iGrafx®**

## "Without a functioning DMS, there is no functional process management"

**Der PROZESS MANAGER**

Our Director of Professional Services, Stefan Hessenbruch was interviewed about Document Management by the online portal "Der Prozessmanager" (English: The Process Manager). "Der Prozessmanager" is the leading specialist portal in the German-speaking world on the topics of process management, organizational development, and lean administration.

**Der Prozessmanager: Tell us: Why is DMS such an important task to tackle, especially for medium-sized companies?**

**Stefan Hessenbruch:** We have noticed that the topic of document management is still one of those that are most frequently requested, also in the context of the process topic. For us, the advantages are, that all relevant documents that play a role, in the context of process management, are contained in one system. This means that everything that the system offers centrally can be used for several topics, including document management.

This means, for example, the whole control of rights: Who is allowed to see this process diagram, are there documents that can be opened and are these also subject to rights control, for example, so that only authorized persons can see the diagram? This can all be done in one system. As soon as we have a media break and link to a document in another system, you again have two places where you have to manage this completely separately, which is much more effort. Companies, who manage this with just one system, have a huge advantage.

## "External pressure will increasingly push companies to change."

New features have also been added over time. We now have a preview where you don't have to download and open documents completely to look at it. All the mechanics for approval cycles and review 'workflows' are also implemented within the system. The processes and other types of documents that can be linked are also available for document management. Seamless versioning, i.e. revision control of documents, is also in the system. Even if someone is an administrator, he does not have the right to delete any versions.

The system is audit-proof, an auditor has the possibility to look at any time, what exactly happened when? Who did it? What did older versions look like? This is very important so that you can search through them again in an emergency.

The 'viewer', a simple user who just wants to read the documents, and the one who takes care of the maintenance of the whole thing, have the same interface. The latter one can do a bit more: Set permissions, check out a document to edit it, create new versions and the other can only view the documents.

Here again, rights control plays an important role, because the normal 'viewer' or reader is only allowed to see released documents. This is also already implemented in the system.

The author can constantly develop a document and create new versions. As long as it is not released, the normal reader is not confronted with it at all, so for both sides it is a very simple 'handling'.

For quite some time, customers have used our 'review' and 'approve' workflows for handling the normal change management challenges of reviewing changes and ensuring the approval. In addition, customers have used our third workflow, called 'endorse' where you swear with your vote: "I will heed this document and will support it going forward." One of our latest enhancements if the new continuing 'acknowledgement workflow'.

Why is that important? Once other 'workflows' were initiated, all parties must complete their voting task to complete the cycle. With the 'acknowledgement workflow' we have the following example: There is a company policy that every employee should know. This is published and subsequently employees will leave the company and new ones will join.

This would have to be restarted with the other 'workflows' each time so that it is distributed to the new colleagues again. But then all other employees receive it as well. This 'acknowledgement workflow' solves exactly this problem: Only new 'users' who join have to take note of it. All those who have already done so are not bothered any further.

If there is a new released version of a document and, for example, only a spelling error has been corrected, then I can pause this notice procedure briefly, place the new released version and then say, "Now I'm starting it again, but I'm doing a 'rollover'," meaning that everyone who has already cast their vote will not be contacted because it was only a minor correction. I can also completely restart it if essential content has been changed in the policy.

This is another great new feature that plays an important role in document management.

**Der Prozessmanager: Wonderful, thank you for the detailed explanation. What we are also interested in even more now - in your role, you are actively contributing to the digitization of companies. Do you have an explanation as to why many mid-sized companies still rely on paper files that somehow don't store data digitally? In other words, they don't use any form of document management system at all? Do you have any ideas as to why this is?**

**Stefan Hessenbruch:** No.

**Der Prozessmanager: None at all?**

**Stefan Hessenbruch:** There is no reason. Does anyone still have anything on paper in a folder in their closet, or are we talking about Word and PDF documents that are on a network drive? That is an issue we encounter more often, that a new customer who is interested in iGrafx has also seen.

Eventually the classic answer comes to this question:

"Yes, it has always been like that, and now we had the problem that an auditor came to the company and said, "It doesn't work like that. There are documents on a network folder that anyone can access. They may contain sensitive data. You can't do it like that."".

Most of the time, it's external constraints that push companies to establish a reasonable solution. iGrafx - for example - offers a very simple way to bring an entire network drive with thousands of documents onto our platform with one mouse click, and from that moment on, you immediately have versioning, release control, rights control with it. It is all available instantly and you don't have to change a single document in any way.

**Der Prozessmanager: So, in other words, there are actually only advantages to bringing something "bigger" into the company in the form of a document management system or beyond, where you can also map other things, such as process landscapes? Even if you are already looking a bit in the direction of process automation here: How important do you think that is in this context?**

**Stefan Hessenbruch:** One more point, which I also consider an extreme benefit: If documents are on a network drive and you are looking for a specific document, which you know includes a term in there that is unique - there is no way to do a full-text search on a network drive. As soon as the documents are in our system, every document that contains text is full text indexed. This means that it is immediately possible to identify and retrieve these documents from the system using a simple text search.

Now regarding automation: Do you have a concrete example? What is to be automated, or was that a very general question?

### Der Prozessmanager: Rather general and later we can get more specific...

**Stefan Hessenbruch:** I'm currently going through the last customer projects that involved automation and in which existing documents played an important role. Most of the time, when something is automated - and in automation there is the option of having accompanying forms - it is very often the content of a document that is converted. Often it is about the processing of data within the document, which then the 'workflow' is supposed to take over.

This means that an HTML form, which is available on a web browser and with which I can work, then actually replaces what was previously done, for example, in a Word document. Previously you would create a Word document as a template, call it up, enter the data and save it somewhere on the network drive. Of course, this can then be replaced and completely automated via a workflow.

If it is now a question of the document being used only as an attachment for an automation workflow, I have an important processing workflow for a customer problem. Whenever a similar problem is processed, one must have access to the current contract that the customer has in the first place - this is available in a PDF document where the signatures of the managing directors can be found or a non-disclosure agreement.

Next, I have the possibility to attach a document in an automation simply by 'drag & drop', in order to have it constantly available in this workflow. Everyone who participates in this workflow gets his mask on the screen with the task which he must do now.

You can also always check: A) What documents are still attached here? Is everything there, do I have to look something up, or can I open it immediately?

So multiple scenarios of how the whole thing is done and can be used in the workflow.

### Der Prozessmanager: Perhaps you could put that into context? In your opinion, what is the greatest advantage of using a document management system correctly, assuming that all employees use it?

**Stefan Hessenbruch:** First of all, having everything available centrally when it's a cloud system. It doesn't matter whether I'm in the car - but hopefully not as the driver - or need to look something up in a document on a cell phone. Even when I'm on vacation at the beach, I might be asked by my boss to "do something really quickly": I simply have access, no matter where I am, if the whole system is set up accordingly, of course.

Second point: The assignment of rights, which we have already addressed, is certainly very important, also with regard to collaborative work. But not everyone is necessarily allowed to have access to every document and see everything. Readers are only allowed to see their own shared documents: That happens automatically. This is also a crucial point that a document management system like this can fulfill excellently.

I had already mentioned the full text search - this is also elementary to find things quickly: Nothing is more annoying in a company than knowing that the information exists, but you just can't find it. You dig through all sorts of folders, open 50 documents to check if it is the info you're looking for. That's not necessary when you have a decent system for finding something quickly.

There are document management systems that can do much more than what iGrafx can do. We don't want to replace or compete with them. For us, it's always about the document management system in the context of process management.

This means that we generally have all documents stored in our system that are represented as processes. Hence, we can also link our processes and process diagrams directly to these documents.

A reader who may not just be looking for something in a document, but who is looking at the process and wants to know what is being done there, will immediately see that their next activity requires a form, that is directly linked in the process description.

The interaction between the process flow chart and the documents required in this process is included, and this is something that a "normal document management system" cannot do in this form.

## "The biggest danger for companies are isolated solutions in IT."

**Der Prozessmanager: Perhaps we can go in more depth: There are so many singular interfaces or singular software that are used inconsistently in companies. Where is the danger for companies that do not have uniform interfaces and rely on solutions that do not communicate with each other?**

**Stefan Hessenbruch:** This only poses a danger if they are islands that cannot be brought together because it requires more effort. Then you often have duplicate data maintenance - that's just a huge waste of resources.

There are different special tools for different topics. IT tasks need other tools than a personnel administration. I can't handle IT topics with a system in which I maintain my employee master data - it doesn't fit!

But both pieces of information are perhaps important in a process: With which IT system do I have to process this master data? We have mapped that in a process, and we have a connection to the personnel system and a connection to the IT system. In other words, we can serve as a central interface or documentation where you can find everything that is relevant for the particular topic or problem that you want to deal with at the moment.

And that's how we see ourselves as iGrafx: that we can bring things together with our interfaces in different directions and offer them centrally to the reader or processor.

**Der Prozessmanager: Once again, it becomes clear how important process management actually is. You are already an "old hand" and very experienced, so perhaps you would like to take a look into the crystal ball:**

**Where do you think it's all going in the next three years? Where do you see the market going in the next three to five years?**

**Stefan Hessenbruch:** That's a difficult question, because it's easy to put your foot in your mouth. There are a lot of 'hype' topics at the moment that are being pushed insanely. There's the old German saying, "old wine in new wineskins", that things that have been around for a long time are getting a new name. One very important topic is the push for digitization and that people don't only understand the following as digitization:

"I'm now going to scan a document and put it on my network drive electronically," but that people really develop this process thinking: How can I automate things either partially or completely?

How do I have the opportunity to take things out of the hands of employees that tend to be perceived as annoying work, so that a person can contribute and make better use of the value they really have. Everything else is taken over by the digital world. That's actually where I see the most important points, i.e. digital transformation: How does it work?

What - in my opinion - is a big 'hype' topic is 'process mining', a topic in which there are more hopes than you can really get out of it.

'Process Mining' is the savior for many: "I can now look through my whole company and know what's happening.". No, 'process mining' only targets things that are already running in electronic systems. Anything that happens manually in any way, decisions that someone makes and communicates to someone else, is not in any electronic system and cannot be accessed through 'process mining'. That's why it's an important piece - but just a piece and not the solution to everything.

Robotic Process Automation is also a topic that is being heavily 'hyped' at the moment: It absolutely has its justification, but many companies are approaching it the wrong way or are not yet sufficiently informed about what is important when considering this topic.

iGrafx can help with all of these issues because RPA requires the identification of individual elements that a digital worker may be able to take on. To do that, you first have to know: How do we function today? It may also be that a process, as it is 'designed' today, may need to be redesigned somewhat to better suit the topic of RPA.

So just replacing things selectively with a 'digital worker' does not necessarily make sense. RPA companies approach their customers, advising and trying to advance this understanding.

I also see this for the future: Many companies will have to rethink themselves, because the 'hype' that is taking over at the moment is being misunderstood and will lead to companies acknowledging that it is either not quite so simple or one has only tackled things half-heartedly.

And what else will happen in the future? One idea that definitely exists: Making a user interface different. I can't say yet what else awaits us in the future. But I'm very excited about that - I think as technology advances, there's a lot of potential there.

**Der Prozessmanager: Very nice execution. You had talked about the 'hypes'. How important do you consider - let's just call it 'common sense' - in the context of process management?**

Stefan Hessenbruch: Common sense is the most important thing here, in direct connection with the knowledge you need. And knowledge is power - we all know that. A company should avoid thinking:

"We have a problem here: we have to solve it now. We're only investigating this one problem; we're not interested in everything around it."

Afterwards, you make a change at that point and are surprised that things start to go horribly wrong at three other points because you didn't know the connections. This is the issue that we have been working on for decades, namely that precisely these interrelationships in a company, as well as this entire network of dependencies in a system, should be clearly presented.

With this transparency and knowledge that is in there, in addition to common sense - you can move mountains with it and solve the big problems.

**Der Prozessmanager: Thank you very much, Mr. Hessenbruch, for your time and the detailed interview.**

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