



Who We've Worked With

Kefron HR Department – Implementation of
M-Files Content Management



Case Study for

Kefron – HR Department



Electronic Content Management

– Improve how to find, share and manage documents and other data.



Background

Kefron simplifies the document and information management world for our customers, offering a wide range of services which include Document Storage, Scanning and Capture Solutions and Electronic Content Management Systems (ECM). We work to understand our customers business so that we can take the pain out of paper, enabling customers to focus on what matters to them.

We are an M-Files Gold Partner, offering an ECM Solution designed to help our customers to improve how they find, share and manage documents and other data.

The Challenge

Due to the nature of our work and the size of our workforce, a large amount of information is created, processed and distributed on a daily basis and it can be difficult to manage. Who created that document? Where was it saved? Have duplicate copies been created?

It was becoming a growing concern for a number of staff at the length of time it was taking for them to look for particular documents. Crawling through all the different folders that had been created over time by different users was a slow process and even when the document was discovered it had to be determined whether or not it was the most up-to-date version.

This uncertainty over document management was not acceptable for a company like Kefron as we have a strong commitment to quality, as shown by the number of ISO standards we have acquired over the years. Additionally the ISOs state that all information handled must be accurate and up-to-date, further showing that changes needed to be made within the company.

A decision was made to incorporate M-Files into our work environment to help improve information management within the business.

How it worked



The Solution

Why M-Files? M-Files was chosen as it is an innovative product when it comes to document management and, as an M-Files Gold Partner, we wanted to put into practice what we preach.

Providing an easy to implement solution, it incorporates a modern user interface that allows you to easily save documents, retrieve them when you need them and automate the processing of key documents. It comes with a number of key features:

- **Easy to use, simple to deploy and affordable**
Eliminates information silos and provides immediate access to the right content from any core business system and device.
- **Get up and running in weeks, not months**
M-Files comes with all the powerful features businesses need, without a highly complex deployment phase. And since the system integrates directly with Windows, users are instantly familiar with the interface, minimising the upfront learning curve.
- **Easily adapts to evolving business requirements**
M-Files provides cloud, on-site and hybrid deployment options. It also integrates with numerous business applications, like CRM and ERP. So whether it's security & compliance, mobility, disaster recovery or workflow management, it can deliver the functionality and flexible licensing structure to support those requirements.
- **Find information fast**
The technology uniquely uses metadata, not folders. Metadata organises a document by 'what it is', not 'where it is,' like in a traditional folder system. This eliminates the duplication of content and makes it intuitive for users to find exactly what they're looking for.
- **Solutions for any business, in any market**
Even in the most demanding, regulated industries, M-Files offers solutions across all vertical markets to help small-medium businesses, through large enterprise organisations, manage all their documents and mission-critical workflows.

“We wanted to put into practice what we preach. M-Files has been named as the only Visionary in Gartner’s 2016 Magic Quadrant for ECM”

How it worked



Implementation

The project began with a requirements gathering session between our Head of HR and Kefron Professional Services, the team in charge of M-Files within the company. It was decided that the HR department would be the first department to trial the system. Due to the large volume of information that the HR department was handling, it was decided to migrate the information in three phases, for greater control and to ensure no information would be lost. The stages would be as follows:

1. Employee records and policy updates
2. Training records – Standard Operating Procedures (SOP), Service Level Agreement (SLA)
3. Recruitment documents

Following the requirements gathering session were the standard steps taken by the Professional Service team for each M-Files installation:

- Review of documents
- Identifying and installation of infrastructure required, backup and recovery procedures
- Installation of M-Files on server and clients
- Designing and creating the M-Files HR Vault
- Migration of existing employee data to the M-Files Vault. The HR team had been using VIP system and, despite this system being relatively old and outdated, was still able to integrate seamlessly with M-Files. Even with a large volume of information to be transferred, the migration took just a short period of time.
- Demo of the M-Files Vault to HR
- Training provided to HR personnel
- Scanning of existing documents
- User Acceptance Testing and charges to the M-Files Vault
- Phase 1 Go-Live

Our Professional Services team worked closely with the HR Department throughout phase 1 of the project to ensure a smooth transition from the paper based system to the digital solution. This support system will be in place for the remaining phases.

'Train the trainer' type user training was provided by Kefron Professional Services to one member of HR and due to its intuitive design, this member was then able to easily train the rest of the HR team. Training was then provided to senior managers after reviewing and approving the use of it in the HR department.

Benefits

The installation of M-Files has been a huge success for the HR Department for a number of reasons:

- Documents across the company can be stored safely in one place which is easily accessible by relevant people when needed, e.g. for audits.
- As M-Files uses metadata, it organises a document by 'what it is', not 'where it is,' making it far easier to locate within your system.
- Metadata also eliminates the duplication of content ensuring users find the most recent version of the document they are looking for.
- We have saved on physical storage space as more of our documents are now online.
- Documents are no longer being lost in people's email inboxes or sitting idle on staff's computers.
- There is now a greater visibility for management of documents and processes around documents.
- Audit trails are created for every file, ensuring users can see who accessed the information and what changes were made.
- Managers can now instantly see updated policies which can be then passed on to staff, ensuring that everyone is kept up-to-date with company procedures and best practices.
- Forces staff to comply with processes around certain documents and procedures which will help with audits.

Next phase

The initial success seen after the first phase of the information migration has been very positive, especially with the automated policy workflows. This has given the HR team great confidence and belief in the product. The success of Phase 1 means that we can confidently proceed with the implementation of phases 2 and 3.

We have already started using M-Files in other departments within the company with the long term goal being efficient information management throughout the Kefron business.

“What I enjoy the most about M-Files is how easy it is to locate employees' files when I need them at short notice”

Barbara Carroll, Head of HR, Kefron

We Manage
Information
& Documentation
Simple.



About Kefron

Kefron are The Document and Information Management People.

We simplify the document and information management world for our customers, taking the pain out of your information processing issues, offering a complete document management lifecycle service.

Our business exists to improve how you manage your information, with our expertise supporting both physical document storage and digitisation of your information.

We create workflows and solutions through our expertise which enhance efficiency and ultimately, productivity. ***We can make a real difference to your business. This is what drives us.***



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