

# **CROWN RECORDS MANAGEMENT** **ENTERPRISE CONTENT** **MANAGEMENT**

Software for digitalising business processes

*The power of memory*  
[crownrms.com](https://crownrms.com)

# WHAT IS ENTERPRISE CONTENT MANAGEMENT

Enterprise content management (ECM) is much more than just the digital archiving of documents: ECM is working with living documents and important business data within an intelligent software system. Users can quickly find documents, data, and information of all kinds, link them to workflows, use collaboration tools, and uncover trends with powerful analytic capabilities.

Crown can offer exactly this, and can be at the heart of your IT landscape when it comes to digitalising your company processes. The software integrates with existing systems, ensures more efficient workflows for all departments, and offers a range of technical add-ons to meet all your requirements.

**Enterprise content management  
for your business**

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# ENTERPRISE CONTENT MANAGEMENT

## For your business needs

Our new ECM Suite is the ideal way to digitalise your business today and in the future. With our ECM software, you can digitalise, automate, and analyse business processes and information according to your exact requirements. Our **ECM Suite** also functions as a central location to securely manage and store your company's data and documents according to legal requirements and compliance guidelines.

But that's not all: Our **ECM Suite** actively supports your daily work routine with numerous functions for efficient document management and intelligent tools that get critical data and documents into business workflows, such as processing invoices or managing contracts faster.

Different employees, different tasks – our **ECM Suite** has a multi-client strategy designed to meet all your requirements. These include the **Desktop Client** for employees who complete a large part of their tasks with Microsoft Office, the **Workflow Client** for employees who are involved in approval processes, and a wide range of other Client solutions, as well as for mobile working.

It even has a function that allows you to customise your workspace and transform the Suite.





## COLLABORATION

Teamwork goes digital

Effective teamwork is the secret to a successful business. Our **ECM Suite** offers numerous powerful collaboration tools that allow your employees to work as efficiently and productively as possible.

It provides a central platform for exchanging details or changes relating to documents. Employees can collaborate on documents in real time, or @mention colleagues to notify them of important information or new ideas.

The tool also enables users to carry out polls and link additional documents as well as add hashtags to categorise documents under specific topics.

Your personal information hub opens when you start the **ECM Suite**. This space offers each user an at-a-glance view of upcoming tasks, new posts in the **feed**, or recently used documents. It is simply a great way to stay organised.

### FEATURES

- Exchange information directly
- Stay informed of the current status of documents
- See important information at a glance

# iSEARCH

## Stop searching, start finding

The **iSearch** module integrated in our **ECM Suite** lets you find important information and documents in an instant, saving you time and resources. **iSearch** not only searches but also extends to integrated third-party applications such as ERP, CRM, and e-mail systems.

This greatly improves the quality of the search results that are returned, ensuring you quickly locate the correct information in the right context.

**iSearch** features numerous functions to help you find the information you need even faster, such as a range of intelligent filters for narrowing down possible matches. As soon as you start to type a search term, **iSearch** automatically displays suggestions and synonyms related to the search term you entered. The search function in our **ECM Suite** not only looks up the metadata or keywording information, but also searches the full text contents of the actual document.

Our **ECM Suite** presents you with the most relevant information at a glance, allowing you to focus on your core business instead.

### FEATURES

- Intelligent integrated search functions
- Easily integrate third-party applications
- Locate information in full text contents and metadata





## DIGITAL MAILROOM

### Automate from the start

With our **ECM Suite**, you can digitalise and classify incoming documents, no matter the format or input channel, and forward them to a downstream business process. Our **ECM Suite** provides the perfect digital medium for handling daily tasks such as signing off invoices, submitting offers, or processing orders.

Our intelligent digital mailroom solutions streamline document-centric business processes at the point of entry. The **DocXtractor** module analyses and processes documents from different incoming channels, extracts information from the respective document, checks it against the data in an ERP system, and reconciles it with AI technology. As a result, you can route business documents to the corresponding business process or

department almost fully automatically. The new **Smart Input** is your easy-to-use assistant for adding metadata to your documents: The tool intelligently recognises document types and extracts all relevant text information. Automating this process saves valuable time that you can devote to other tasks.

The optional e-mail management package **XC** reduces the load on your Exchange server and enables you to meet retention requirements. At the same time, you ensure that information in e-mails is readily available to all employees. The system integrates easily with Microsoft Outlook and our **ECM Suite**, providing a superior platform for managing information across your organisation.



# WORKFLOWS

## Automate your processes

Agile processes are a key factor in saving time and money and, ultimately, running a successful business. Companies need to automate certain tasks so that documents and information get to where they are needed fast. Our **workflows** provide the perfect framework for building workflows to replicate and automate internal procedures and processes so that you can streamline repetitive, manual tasks, make informed decisions, and approve requests quickly.

Our **ECM Suite** comes with a built-in form designer that provides multiple options for integrating your own scripts. In combination with the option to incorporate server-side processing rules, **workflows** are the ideal tool for automating your business processes. Once you have triggered a workflow, you can view the status of a process any time thanks to numerous analysis and visualisation options.

### FEATURES

- Automate processes according to your needs
- Track decisions and establish accountability
- Multiple options for analysing processes



## ANALYTICS

### Real-time data analysis

To succeed in today's business world, you need real-time actionable data with facts and figures at your fingertips. The Analytics component integrated in our **ECM Suite** enables you to connect data from different sources within your ECM Suite. For example, you can analyse the current cashflow or ongoing contracts and generate valuable insights for your business.

The highly versatile tool lets you build and configure different data views so that you can evaluate and use information to suit your purposes. It takes just a few clicks to create custom dashboards for invoice ledgers, contract management reports, personnel files, and much more, all the while ensuring strong security for sensitive information.

The best-in-class permissions system guarantees that users are only able to view and edit documents and data that they are authorised to access.

### FEATURES

- Customisable options for analysing data in your system
- Visualise data with the help of diagrams, tag clouds, or metrics
- Dashboard auto-refresh function

# COMPLIANCE AND DATA PRIVACY

## Get data security right

Data security and privacy are increasingly integral parts of the information policy landscape. When it comes to storing important or sensitive data and business documents, our **ECM Suite** offers the necessary platforms and tools to ensure that you are able to meet statutory regulations and data privacy laws such as the General Data Protection Regulation (GDPR). In addition, there are numerous functions that enable you to implement internal compliance guidelines quickly, transparently, and securely.

The solution incorporates a range of basic functions, such as version control, logs, permissions, and sophisticated encryption technology with up to 2 million possible encryption keys, helping you to meet legal requirements for storing data and documents. These all come as standard with our **ECM Suite** and are easily configured to match your requirements, laying the groundwork for successful compliance.

### FEATURES

- Encrypt sensitive data and label personal data
- Use role-based permissions to control access
- Safeguard against data loss
- Audit trail of changes and non-modifiable version history
- Comply with and monitor retention obligation and deadlines
- Access documents permanently





# BREAKING INFORMATION BARRIERS

*Flexible solutions for seamless processes*

Enhance the functionality of your ECM Suite: Connect data among systems with numerous modules and interfaces that blend perfectly with your existing IT infrastructure.



## CUSTOM CLIENT SOLUTIONS

An ECM system that can do more

Transform our **ECM Suite** into your own personal ECM system. With our individual client solutions for different requirements and tasks, you can add the functionalities you need for your daily work.

The **Desktop Client** is directly integrated into the desktop as a dynamic sidebar. Optimised for intuitive use with Microsoft Office products such as Outlook, Word, Excel, or PowerPoint, it also allows you to edit other documents and file types easily and efficiently. With our **Desktop Client Plus**, you also have access to your reminders and workflows, and can view them in full-screen mode.

For employees who only need to use our **ECM Suite** for approval processes, we have the **Workflow Client**. With its tailored range of functions, the client is optimised for participation in workflow-based processes, making for faster approval times and allowing your employees to work on other tasks.

### A RANGE OF OUR CLIENTS TO MEET ALL NEEDS

- Java Client
- Web Client
- Desktop Client and Desktop Client Plus
- Workflow Client

# INTELLIGENTLY PROCESS INFORMATION

## AI power for your document processes

Businesses today need to be able to rapidly analyse, process, and deliver information. As such, the demand is high for intelligent systems and solutions that automatically sort and route data from the moment it arrives in the mailroom. Especially if you receive a high volume of documents, our **ECM Suite** offers digital solutions for automatically capturing and processing incoming documents.

For example, the **Barcode** module streamlines the document capture workflow by assigning documents to the correct transaction based on the retrieved barcode information.

The **DocXtractor** module uses state-of-the-art AI technology to analyse and process documents from different incoming channels such as e-mails, PDFs, Microsoft Office documents, and paper-based documents including scanned mail, invoices with or without a QR code, or faxes. The tool extracts the required information from the document, checks it against the data in an ERP system, and reconciles it. Finally, the document is transferred to downstream systems and processes. Invoices, for example, are automatically fed into the corresponding review and approval workflow. All this empowers you to manage information more efficiently and cost-effectively across your organisation.

### FEATURES

- Accurately extract document contents
- Make information readily available
- Route data to the correct process or department
- Seamlessly integrate with third-party systems





## MOBILE WORKING

### Mobility means flexibility

In today's workplace, people need to be make informed decisions on the move. Our ECM Suite provides invaluable tools that empower you to work from any place, at any time, on any device.

Thanks to our phone and tablet apps for **Mobile Devices**, our **QuickScan**, and **Connect**, you have access to all the ECM functions you need to do your job effectively. No matter whether you are working from home, or on the way to a meeting and need to transfer documents with your phone camera — mobile solutions with our **ECM Suite** provide maximum flexibility.

In addition, it allows you to synchronise data between repositories at different business locations. This way, you can be sure that employees working in different offices all have the same information to hand. Our **ECM Suite** brings flexibility to the way knowledge is organised in your company.

# TEAMROOM

## Collaboration at all levels

Effective teamwork and collaboration among employees are the cornerstones of any successful business. However, making sure that your employees are given the tools they need to effectively engage with service providers and customers across organisational boundaries is equally important.

Optimised for our **ECM Suite**, **Teamroom** offers a universal platform for employees and external stakeholders to work on joint projects and much more, even if the users are not connected to the system. The technology is based on virtual project rooms that enable users in your company, and external project stakeholders with access privileges, to work together. A **Teamroom** can be easily accessed from any browser using the **Teamroom Client**.

Users with a moderator access rights can add participants to a virtual project room at any time. Thanks to **Teamroom**, you can work on shared documents with colleagues at other locations, as well as with customers and external service providers. Easy collaboration, no limits.

### FEATURES

- Create virtual project rooms
- Collaborate on documents
- Access Teamroom via a web browser



# CONNECT PROCESSES ACROSS SYSTEMS

Let integration work for you

The information platform **ECM Suite** connects data from multiple sources in one place. Not only that, our range of flexible additional modules and intelligent solutions allow you to integrate your landscape with other systems for efficient, streamlined digital processes.

For **SAP®ERP** we can offer solutions for connecting our **ECM Suite** to your SAP system. The **Smart Link for SAP®ERP** interface transfers documents created in SAP or filed via an SAP object straight to your system conveniently and without switching programs. Additional SAP tools that enable integration of ERP data sets in our **ECM Suite** include **Toolbox for SAP®ERP** and **Connectivity Pack for SAP®ERP**.

But that's not all. Our **ECM Suite** integrates with the certified interface **WebDAV for SAP®ILM** for GDPR-compliant storage of SAP®ILM projects and scenarios. You can be sure all your data is processed and managed in accordance with data protection regulations.

## FOR SAP®ERP

- Suite for SAP ArchiveLink®
- Smart Link for SAP®ERP
- Connectivity Pack for SAP®ERP
- Toolbox for SAP®ERP
- WebDAV for SAP®ILM





# INTEGRATION SERVICE

## ECM functionalities in ERP and CRM

Optimal interaction among IT systems is essential for efficient business processes. For our **ECM Suite**, we have gone one step further with our **Integration Service**. This service, directly integrated with SAP@Business One, Microsoft Dynamics 365 Business Central, and Salesforce, enables you to use a wide range of ECM functionality in your ERP and CRM systems.

These integration capabilities allow you to benefit from the many advantages an ECM system offers without leaving your usual work environment. Our **ECM Suite** lays the foundation for connecting your IT landscapes, giving you the tools you need to drive efficiency across different systems – the key to your company’s success.

### FEATURES

- Integrate different software systems and components
- Easily multitask across systems
- Merge with your ERP and CRM systems
- Create holistic views of business information



## E-MAIL MANAGEMENT

### Get your e-mail under control

Storing e-mails in line with retention policies poses a challenge for every company. There are two important factors that need to be considered: statutory storage periods for business-related documents; and the protection of personal data. With our **ECM Suite** and the e-mail management solutions for Microsoft Exchange, HCL Notes, and Domino, your business is well equipped to overcome this challenge.

Our **ECM Suite** offers e-mail archiving for long-term storage and automatically saves e-mail messages to specified folders, making e-mail management an integral part of your company's ECM strategy. Thanks to automated, rule-based and server-based e-mail archiving, you maintain a complete and accurate audit trail of all correspondence and are able to meet data protection and compliance regulations.

#### FEATURES

- Incorporate e-mails into business processes
- Automatically archive e-mails in line with regulations
- Seamlessly integrate with Microsoft Exchange, HCL Notes, and Domino

# OUR OTHER MODULES AND INTERFACES

## Broaden your horizons

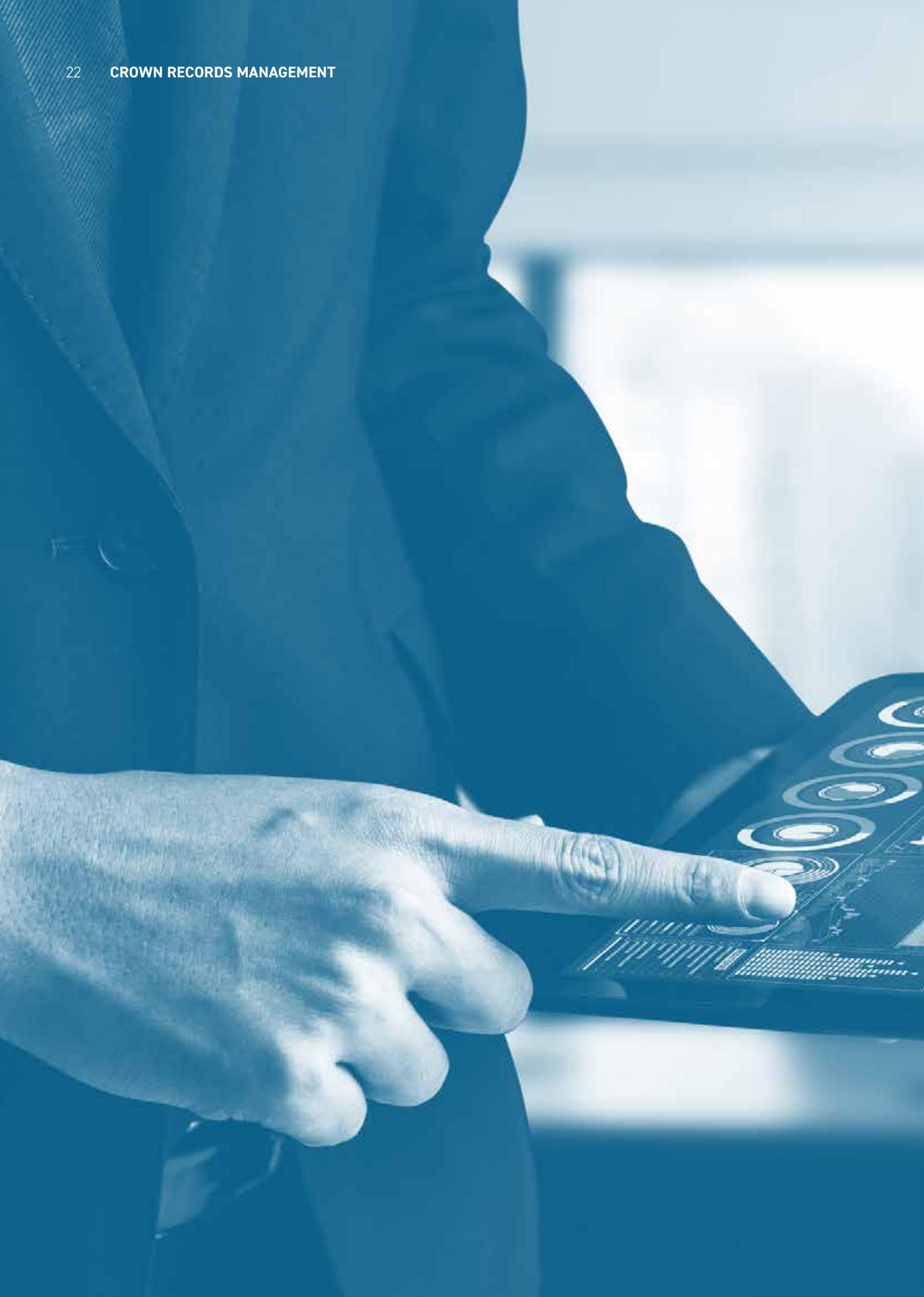
Make our **ECM Suite** and the wide range of adaptable modules and interfaces, the ECM system of choice for your organisation.

The new suite features an updated version for **Microsoft SharePoint**, which enables you to archive documents from Microsoft SharePoint libraries to our ECM platform. The module also provides you with the convenient option to access folders and documents integrated in a SharePoint site from a browser.

- **Backup Server**  
Easily store documents long term
- **Business Logic Provider (BLP)**  
Intelligent middleware for connecting processes
- **CMIS Interface**  
Integrates content management systems
- **COLD**  
Fully automated bulk import of spool and printer data
- **Health Check Service**  
Centralised, configurable monitoring of system parameters
- **Interface for Microsoft Office Online**  
Open, edit, and collaborate, on Microsoft Office documents in a browser
- **Notebook Client**  
Full ECM functionality for the office and in the field
- **Server for Notes and Domino (SAND)**  
E-mail management for HCL Notes and Domino
- **Productivity Tools**  
Smart solution packages and web applications for projects
- **REST Service**  
Interface for easy integration of third-party programs and web apps
- **XML Import**  
Import bulk data the fast way

Find out what our additional modules can do and configure our **ECM Suite** to match your business needs: [www.crownrm.com](http://www.crownrm.com)





# BUSINESS SOLUTIONS

Our solutions for specialist applications

Your daily processes are at the heart of our offering: Get to know the extensive portfolio of our **Business Solutions**.



# BUSINESS SOLUTIONS IN PRACTICE

Digitalisation strategies for everyday situations

Companies looking for end-to-end digitalisation face a wide range of challenges. Help is at hand thanks to standardised solutions that you can implement quickly and easily in different departments.

Our tailored **Business Solutions** are based on best practice approaches, allowing you to manage specific company processes and tasks. We offer a range of specialist applications for optimising your HR, invoice, contract management processes, and much more.

Our range of out-of-the-box solutions can be adapted to meet individual requirements, ideally complementing our **ECM Suite** platform.

**Every day, employees in all areas of your company can benefit from our best practice-based ECM solutions – from the front desk, to accounting, to HR. Here’s an example of how our Business Solutions can streamline your operations.**

A team leader wants to post a new position and consults with the company **Knowledge** community to learn about the current recruitment process. The knowledge database provides instruction to simply click the “Submit personnel request” button.

This action triggers the digital recruitment process in **HR Recruiting**. The team leader’s supervisor approves the request, forwarding it to the HR department. Once approved, a posting is created and the position is uploaded to linked job portals.

Applications to the posted position are now received

## HIRE THE BEST CANDIDATES WITH HR RECRUITING

- Automated recruitment process
- Easily transfer candidate data
- Extensive ranking system
- Compliance with statutory obligations for data privacy and protection



## WELCOME YOUR GUESTS WITH VISITOR

- Coordinate visits easily and welcome personal
- Issue personalised visitor badges
- Up to date visitor lists for security
- Ensuring data privacy

online and processed with **HR Recruiting**. Once the relevant documents have been reviewed, the team leader and supervisor decide to invite their preferred candidate for an interview. **HR Recruiting** offers customisable e-mail templates for candidate correspondence, allowing interviews to be quickly and professionally scheduled.

On the day of the interview, the candidate is greeted on a welcome screen in the lobby – the digital candidate management solution **Visitor** makes for a positive and professional first impression. Employees at the front desk are prepared for the appointment, issuing the candidate a personalised visitor badge on arrival.

Following a successful meeting and after a short appraisal of the interview data, the team leader and supervisor decide to hire the candidate. The application process is completed in HR Recruiting and the HR department starts a custom onboarding process. Thanks to **HR Personnel File**, the candidate data can be transferred straight to a digital personnel file. The digital personnel file contains all HR-related documents, regardless of their format, including the new employee's contract. The digital contract management solution **Contract** not only creates the digital record, but also manages it throughout its life cycle. From the end of the probationary period, to upcoming anniversaries, to retirement – with **Contract**, you can keep an eye on all dates related to an employment contract.

## BENEFITS

- Share knowledge company-wide
- Collaborate to advance ideas
- Quickly find information
- Build a central knowledge portal
- Empower employees





## FEATURES OF CONTRACT

- Contract governance and evaluation options
- Manage contract data in one location
- Practical integrated calendar
- Digital contract files
- Compliant contract management

And that's not all – **Contract** manages much more than just employment contracts – it handles all other contracts in a central file, from leasing agreements to company cell phone contracts. The contract file is linked to the digital personnel file, making all employee information available in one location at all times. In addition to a company cell phone, the new employee also receives a laptop ordered by the IT department. The solution **Invoice** is used to automatically process the invoice received by accounts. From capture to approval, the entire invoice process is ultra-efficient thanks to **Invoice**. Onboarding new hires as quickly as possible requires them to complete a range of training programs. As most of the sessions are available as e-learning modules, **Learning** is integral to the **Business Solutions** portfolio.

**Learning** is a digital qualification and training management system that was developed to manage training content efficiently. Supervisors have an overview of sessions completed by employees and their progress – this is 21st century learning management. At the end of the day, the entire company benefits.

The team leader from accounts is pleased with the new hire, who has quickly learned the ropes and become accustomed to the new working environment. As an entrepreneur, you know that your internal processes are sound and efficient thanks to an end-to-end digital workplace.

You and your employees can focus on your core business while **Business Solutions**, a complement to our **ECM Suite**, streamlines your processes.





# ENTERPRISE CONTENT MANAGEMENT PORTFLIO

## The world of digitalisation

Our ECM Suite opens up an entire world of digital business processes. You can extend the software at any time with numerous apps, modules, and interfaces that integrate seamlessly with your systems. Benefit from digital solutions for key departments at your company.

Our ECM Suite comes in two server technologies depending on your requirements: **Professional**, the standard solution for businesses; and **Enterprise** for unlimited scalability.



**BUSINESS SOLUTIONS**

Digital software solutions for company departments



**MOBILE APPS**

ECM for smartphones and tablets



**CROWN ECM SUITE**

Software for digitalising business processes



**MODULES**

Added functions for ECM Suite



**INTERFACES**

Integration with third-party systems (e.g. ERP, CRM)



**Crown Records Management** helps clients to maximize the value of their “corporate memory” through the storage, active management and timely distribution of information assets.

In 40 countries, Crown provides secure archiving and retrieval of information in physical and electronic format, as well as digital imaging, media management and data destruction.

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## Discover Crown

*A complete range of services  
to help you and your business*

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- World Mobility
- Relocations
- Records Management
- Fine Art
- Logistics
- Workspace