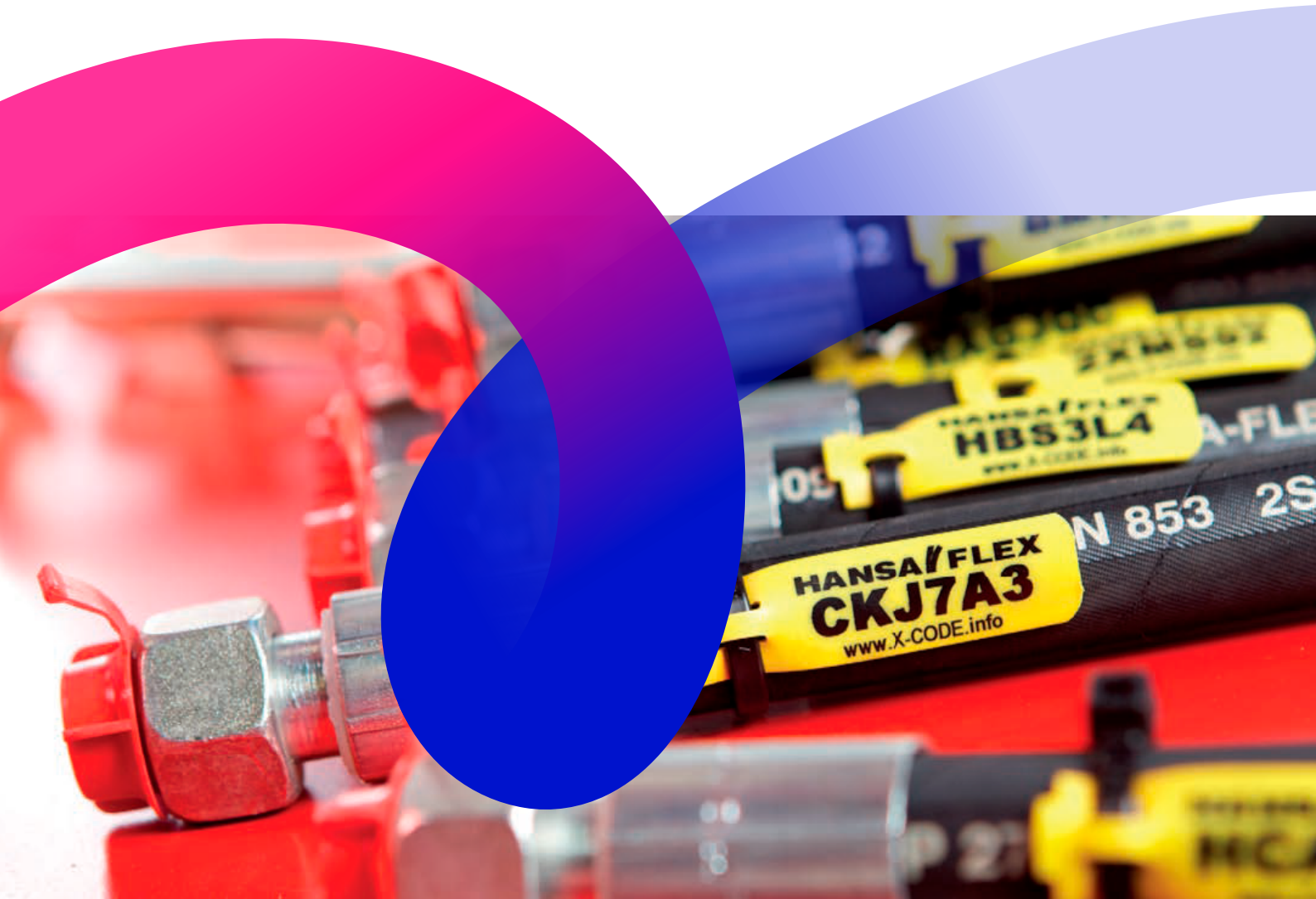


# Driving digitalization: Digital personnel files for HANSA-FLEX

- Doxis digital personnel file: Deployment-ready out of the box
- End-to-end process optimization for HR
- From personnel files to company-wide ECM

## CUSTOMER STORY



# HANSA FLEX





## Management summary

# The first step on the digitalization agenda: the personnel file

Hydraulics specialist HANSA-FLEX targets international growth parallel to the expansion of its product portfolio. The key to its success: system partnership. HANSAFLEX is a one-stop shop for products and services that works in close proximity to its customer thanks to a dense network of branch offices. With 3,900 employees in 40 countries, HR management is a challenge for the company, which is why it decided that it was time to bring a digital solution on board.

HANSA-FLEX had already collaborated with Doxis in the past with extremely good results. The positive experience with Doxis and the usability of Doxis were ultimately what prompted the hydraulics specialist to choose the ECM vendor as its project partner once again. A major factor in this decision was HANSA-FLEX's plans to undergo a digital transformation. Since Doxis can be deployed in a wide array of departments, it is an excellent tool to drive the digital transformation across the company. The first step on this journey was to roll out the Doxis digital personnel file and transition the Bremen-based HR department from paper-based to digital work. HR now manages some 2,000 employees across Germany using the digital personnel file. Time-consuming searches and the laborious filing of paper files have been replaced, giving the HR team rapid access to digital personnel files. Not only do the files contain all of the necessary documents, they also store relevant HR data from the integrated SAP system. The HR team can now provide information on request at the touch of a button and maintain an overview of all HR-related information and responsibilities. Another advantage of using digital personnel files? Employees can work on them locally and simultaneously: There's no more need to keep decentralized files at various locations; hard copies don't have to be sent in the mail and there are no waiting periods. The certified Doxis solution ensures that HANSA-FLEX complies with the legal requirements governing HR management.

## The company

HANSA-FLEX AG began its success story in 1962 as the company Joachim Armerding Industriebedarf. Armerding himself built the first-ever hydraulic hoses in his garage in Bremen, Germany, which were an immediate hit. The business continued to grow and in 1974 was renamed HANSA-FLEX, a name that is now synonymous with being the top provider of hydraulic systems in Europe. The family business is today run by the second generation of Armerdings and continuously evolves its product and service portfolio. Alongside hydraulic, metal, PTFE and industrial hoses, pneumatic and hydraulic components, HANSA-FLEX offers Fluidservice (oil care service), industrial assembly services, technical consulting, and the FLEXPRESS mobile express service. Over 300,000 customers in 40 countries worldwide trust in HANSA-FLEX quality. They particularly value the option to procure all of the solutions they need, including customer support, from a single system partner. That's where the 3,900 employees worldwide come in, 2,000 of whom are based at over 200 locations across Germany. The central HR team at the company's headquarters in Bremen looks after all HR administration and staff development activities.



## Project facts and figures

<b>TOPIC:</b>	Digital personnel file
<b>CUSTOMER:</b>	HANSA-FLEX AG
<b>INDUSTRY:</b>	Mechanical engineering in the hydraulics sector
<b>EMPLOYEES:</b>	3,900 employees worldwide; 2,000 of whom in Germany
<b>CUSTOMER SINCE:</b>	1992
<b>DOXIS SOLUTIONS:</b>	Archive, DMS, BPM, automated inbound mail and invoice processing, digital personnel files, digital contract management, additional eFile solutions
<b>INTEGRATION:</b>	SAP
<b>USERS:</b>	15 users in the central HR and Staff Development departments, access for 100 managers
<b>DOCUMENT VOLUME:</b>	About 2,000 active personnel eFiles with ca. 100 documents each
<b>HIGHLIGHT:</b>	Incredibly user-friendly, marked reduction in time required to search and file, quick and easy out-of-the-box deployment of the personnel file



“It was clear from the start that we would work with Doxis again when it came to rolling out digital personnel files.”

**Nina Orywal, Human Resource Manager,  
HANSA-FLEX**



## Full speed into the digital world

The first step in HANSA-FLEX’s digitalization strategy – to implement efficient HR administration processes – has inspired the company to take advantage of further Doxis solutions, ranging from digital contract management and digital files for production-related documents to customer, supplier and material files. The modular structure of Doxis’s software allows HANSA-FLEX to gradually implement an enterprise content management (ECM) system company-wide that will allow the international hydraulics specialist to roll out further ECM solutions in other areas of the business and optimize processes step by step. The innovative, forward-looking ECM platform paves the way for the company’s successful digital transformation.

HANSA-FLEX’s success depends in no small part on its employees. The HR department based out of the company’s headquarters in Bremen singlehandedly manages 2,000 employees in Germany. In the past, HR had to manage thousands of documents throughout the applicant selection, hiring and development processes – all of which were on paper. No easy task when dealing with 2,000 paper files that are filed chronologically. Manual searches became increasingly time-consuming, often impeded by documents that had been filed incorrectly by mistake. The local sites had to keep redundant decentralized files, making it virtually impossible to comply with legal requirements regarding traceability and secure file management.

Yet another nuisance? Long waiting times for documents. An employee wanting to view his or her personnel file would either have to travel to Bremen or wait days for the record to arrive by regular mail. “We spent most of our time filing and looking for documents. It cost us an hour of each HR employee’s time every day,” says Human Resource Manager Nina Orywal. “That’s a lot of hours if you consider the size of our team. Besides, we were no longer able to adequately comply with the legal requirements. We had to do something, and we had to do it fast!”

## Digital solution wanted

In 2014, HANSA-FLEX decided that its HR department needed digital personnel files. In conjunction with the IT department, a project was launched marking the first step of the company’s digitalization strategy. Right from the start, a key requirement was that the solution put users’ needs first – and they wanted state-of-the-art, intuitive software that would make their work easier. Not only did the software need to make searching and filing more convenient, it also had to offer access to personnel.



files from anywhere across the company. In addition, employees were lacking advanced document administration functions in SAP, the main system used by HANSA-FLEX to manage its HR master data, while managers who needed to view personnel files were unable to access the data in SAP. HR thus needed a personnel file that could be integrated seamlessly into SAP and used for managing and searching SAP data. Alongside simplifying HR processes and enhancing efficiency, one decisive argument in favor of using a digital personnel file solution was that it would introduce audit-proof, data privacy-compliant HR data archiving.

## Confidence in a trusted partner

HANSA-FLEX has been using invoice archiving software from Doxis since 1992, with automated inbound mail and invoice processing modules added in 2014. So what could be better than implementing further digital processes and solutions with the very same partner? “Our experiences with Doxis have been extremely positive. We never even considered putting the project out to tender. It was clear from the start that we would work with Doxis again when it came to rolling out digital personnel files,” says Nina Orywal. Another key to the constructive long-term collaboration: Doxis and HANSA-FLEX see one another as equals. Both offer solutions from a single source and speak the other’s language — an essential ingredient of a long-lasting and successful partnership.



## Key requirements of a digital personnel file solution:

- Simplified workflows thanks to modern, user-friendly software
- Faster access to all HR data, including from SAP, from anywhere across the company
- Uniform personnel files
- Improved, redundancy-free upkeep of HR files and data
- Secure storage of all HR data
- Compliance with legal requirements applicable to HR data management, such as verifiable protection of HR data, compliance with retention and deletion periods



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**Nina Orywal, Human Resource Manager,  
HANSA-FLEX**

## Getting ready for the digital personnel file

Throughout the entire process of introducing the new digital personnel file, HANSAFLEX placed particular emphasis on considering the interests of everyone involved. Users from HR, Staff Development and IT were all given the opportunity to ask questions about the software in the lead up. The issue of security was discussed with the HANSA-FLEX data protection officer and adjusted to meet the requirements of the managers and trainers who would later have access to the personnel files. This collaborative approach was possible thanks in great part to the HANSAFLEX Management Board, which took a keen interest in the new solution and the added value it would generate.

## Preparation is key

“We arranged several internal workshops during the preparatory phase,” says Nina Orywal. “We asked ourselves what we wanted from a digital personnel file and fleshed out our requirements at an early stage so it could go straight into operation.” The first step before migrating from analog to digital workflows was an in-depth analysis of the current situation: What documents does HR use and what processes are tied to these documents? Where are hard copies still circulating that need to be digitized? “We combed through the entire HR portfolio, from employment contracts to sick notes, application forms and all kinds of certificates and more,” says Nina Orywal. HANSA-FLEX held workshops with users to come up with a folder structure for the personnel file. “Colleagues from HR are the true experts when it comes to knowing what they need, where they need to look and how. We incorporated that from the very beginning, asked them what they wanted, and clustered the responses.” With respect to document types, everyone agreed that less is more. The workshops revealed that the more complex the structure, the more it confuses users. Having an overwhelming array of document types makes it hard to know where to file things. The result: Documents are filed in different places each time and are more difficult to find later. Ultimately, the decision was made to go with 10 folders and 200 document types, which were simply integrated into the predefined file structure in Doxis.

## Paper goes digital

Parallel to the Doxis solution test phase, HANSA-FLEX tackled the challenge of digitizing its paper files. "We opted to go with an external scan service provider," says Nina Orywal. "After looking at several, we chose Lager 3000. The company came recommended by Doxis, and deservedly so. The speed at which they removed the staples, scanned and archived the documents was impressive. We would never have managed it so quickly on our own. And the quality was exactly to the standard we hoped." Maintaining the security of personnel files throughout the digitization process was particularly crucial. "2,000 paper files were sealed step by step and picked up in tamper-proof containers. We were given confirmation of handover and had a contingency plan in place that would have kicked in had we needed to access files during the scanning process," says Nina Orywal. Every last bundle of files was digitized, prepared and uploaded to Doxis in encrypted form in just four days. Lager 3000 keeps the personnel files of former employees in fireproof storage in 40-foot shipping containers until the retention period comes to an end.

HANSA-FLEX now digitizes all inbound paper documents itself and destroys the originals. "All new hard copies are shredded smoothly and seamlessly. There is no need to store paper any longer. Copies are always sufficient, even in court proceedings. It's irrelevant whether they come from an audit-proof archive or a paper file," says Nina Orywal.



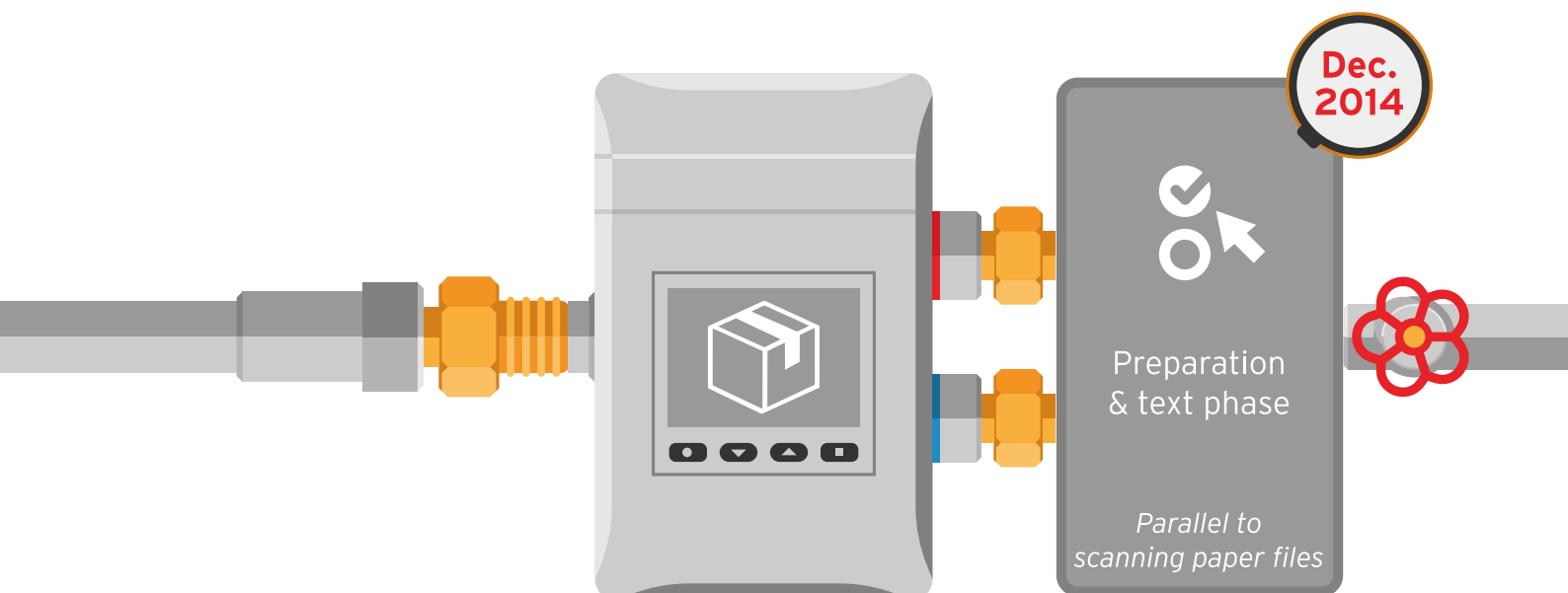


“We were so happy to have found a solution that we could really work with in practice, instead of just talking about it in theory.”

**Nina Orywal, Human Resource Manager,  
HANSA-FLEX**

Another key part of the project was to determine which legal requirements every last document at HANSA-FLEX must comply with. All HR documents must be stored for the duration of the employee's service with the company, while some payroll documents have to be kept for up to 10 years. Today, this is all managed automatically by Doxis — making the implementation of additional security requirements far easier than with a paper-based system. “We spent time beforehand specifying exactly which employees in HR and Staff Development work with which documents, and which HANSA-FLEX employees can access what,” explains Nina Orywal. Only authorized employees can see information contained in the digital personnel files. The ECM system also keeps a transparent log of who actually viewed, changed and deleted which data. The result? HANSA-FLEX now meets all legal requirements applicable to the management of HR data.

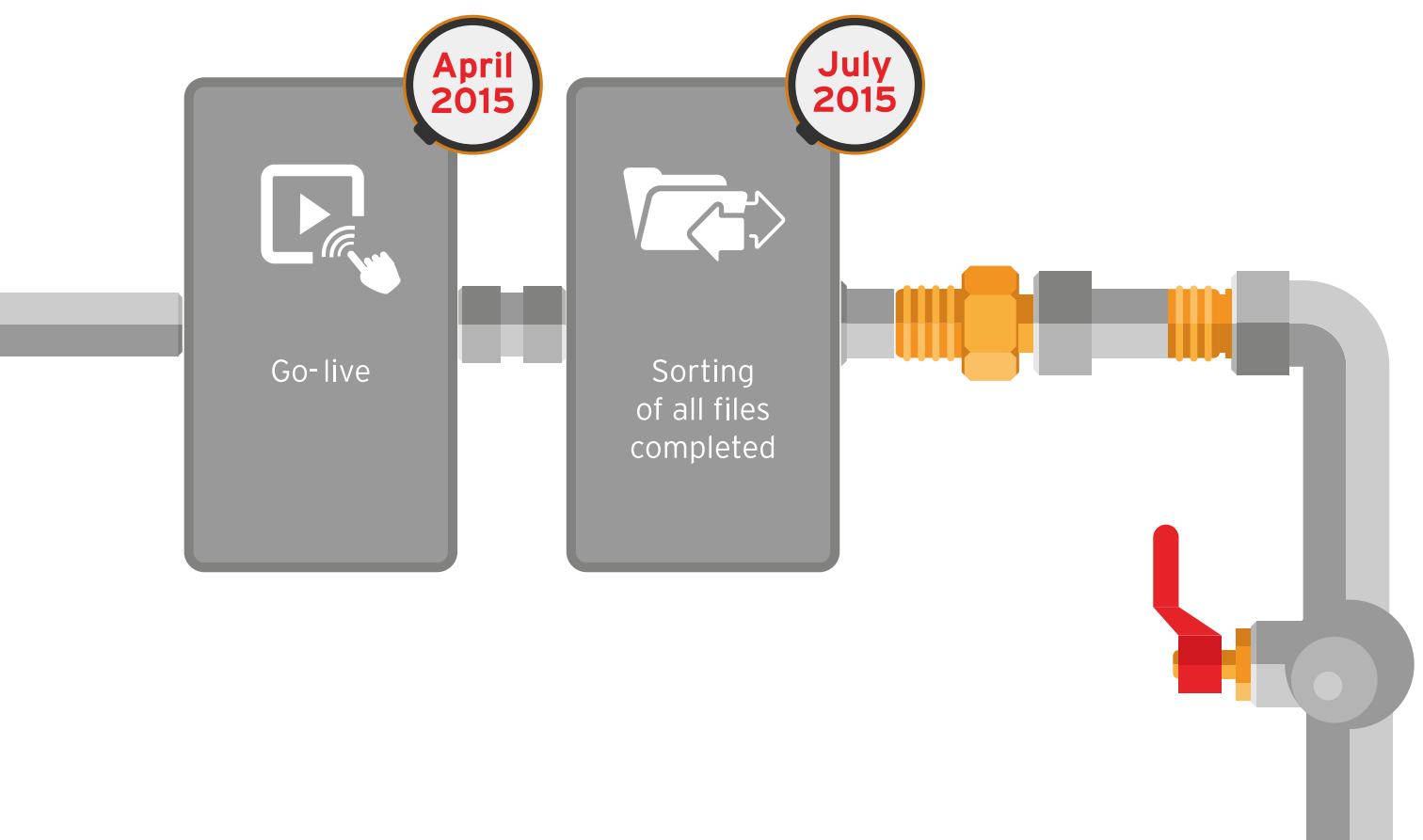
### Deployment-ready out of the box



## From concept to live operation in record time

HANSA-FLEX followed up its preparations for rolling out the digital personnel file with a test phase. Since the standard solution package from Doxis is customized precisely to the needs of HR departments, only a very small number of modifications were needed. “We quickly got the great results we were after and were able to deploy the personnel files in no time,” says Nina Orywal. In the meantime, HANSA-FLEX commissioned an external scan service provider to digitize its paper files.

The digital personnel file went live in April 2015, just three months after the project began. The next step was to manually assign documents to the correct document types and file folders. “We wanted to do this part ourselves, despite the extra effort involved,” says Nina Orywal. “We saved on the time it would have taken to familiarize the scan provider with the system and our document structures. It was also the perfect opportunity for us to learn how to use Doxis.” Allocating the files manually took three months in total and was the last step in getting the digital personnel file fully ready for deployment.



## Goal reached: End-to-end digital HR processes

Instead of working with SAP and paper files simultaneously, the HANSA-FLEX HR department has now gone entirely digital. Doxis gathers the relevant information from each new entry in SAP and directly creates new personnel files for new employees. The digital files make it easy for HR colleagues to find all documents and data in just a few seconds. And thanks to the uniform folder structure, they also know without hesitation where new documents need to be filed. "Doxis is incredibly intuitive to use. The interface is similar to MS Office and feels familiar from the outset. HR colleagues were able to navigate their way around the software in no time," says Nina Orywal. "They are all so happy that information is now available instantly in digital form and that they can access documents on the go. Acceptance of the software is genuinely incredibly high."

Since HR started using Doxis, paper consumption has reduced dramatically and the rented archive used for personnel files is no longer needed. Nobody misses the old paper-based system. The DMS feature in Doxis allows users to process documents as before, but with the major difference that they can now highlight sections of the digital documents and add comments without having to modify the originals.



**Information at a glance: Cover of a digital personnel file at HANSA-FLEX**

## The advantages of digital personnel files:

### FOR THE USERS



Easily file and quickly find personnel documents and files



Fast and easy document filing



Direct, location-independent access to personnel eFiles



Provide information immediately by phone



Simultaneous work on files



Transparency about all information and responsibilities

### FOR THE COMPANY



Manage HR efficiently across all locations



Optimized processes thanks to shorter lead and search times



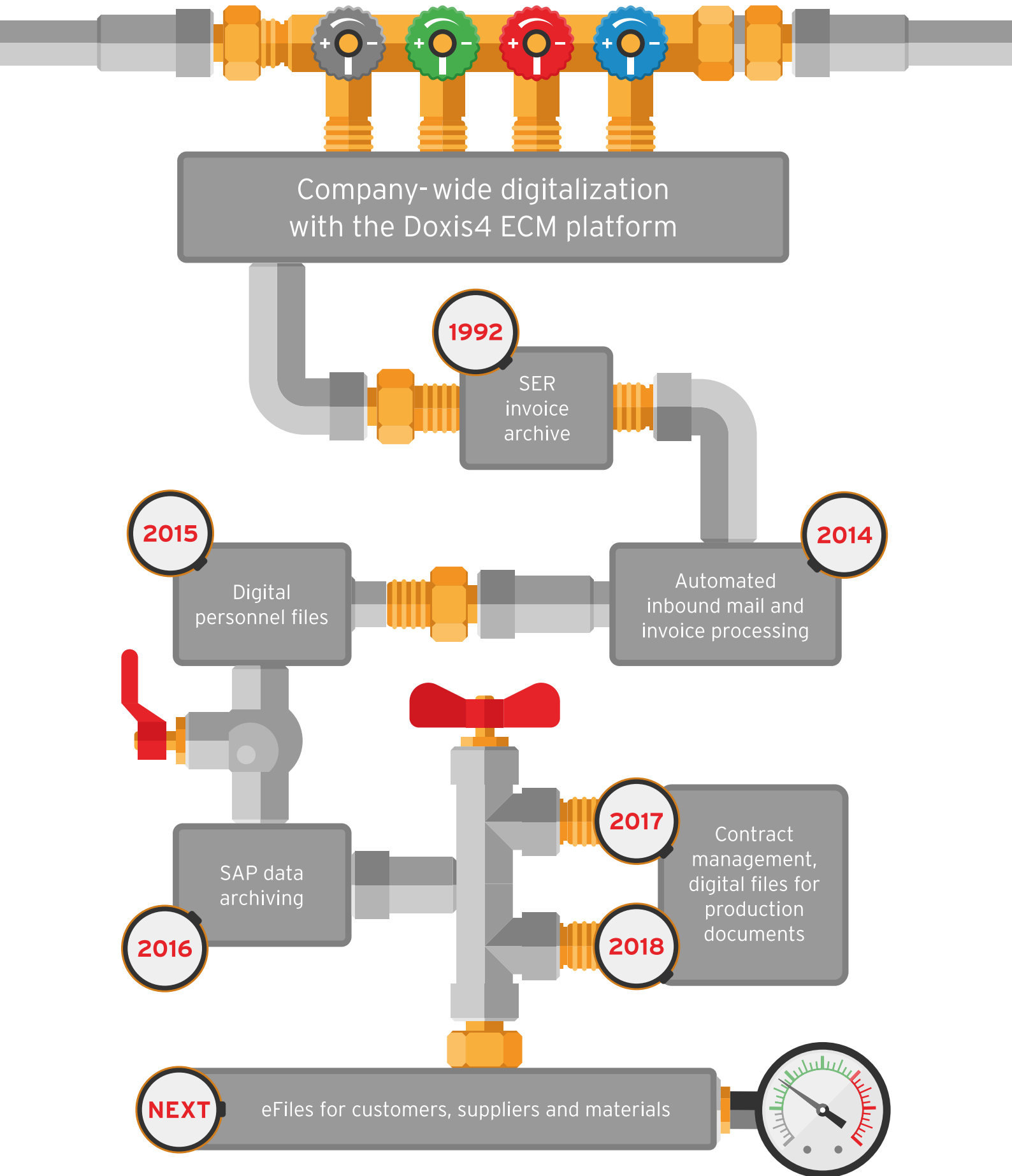
Audit-proof storage of personnel files

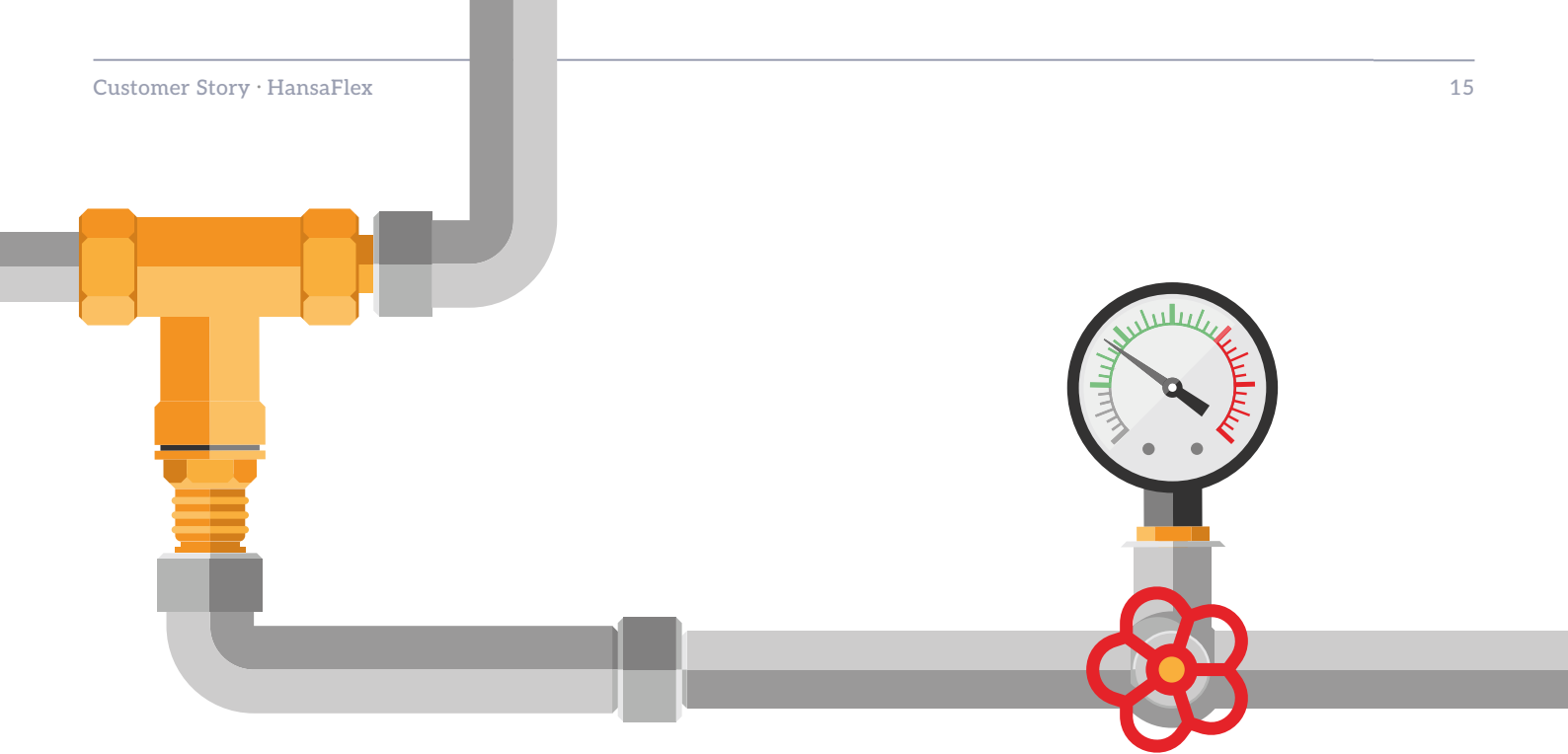


Manage personal data in compliance with data protection policies

## A tangible reduction in workloads

HR is not alone in benefiting from the digital solution: Both HANSA-FLEX employees inquiring about their documents and managers who require access to the files can see how much the process has improved. Once upon a time a call to HR would have been a time-consuming endeavor: The HR colleague would have to lay down the phone, go to the filing cabinet, look for the paper file – which wasn't always where it should be – and then for the corresponding document, which may or may not have been filed correctly. Now, colleagues in HR can stay at their desks and access the right information at the touch of a button. For example, if an employee requests access to their own personnel file, the relevant data can be forwarded immediately in electronic form. "I wake up every day excited to use Daxis! It genuinely gives us a huge advantage and makes our work so much easier. I couldn't imagine going back to how things were," says Nina Orywal. "Who would have thought such a quick and easy project would change so much?"





## One platform for the digital transformation

With Doxis, HANSA-FLEX has an ECM partner on board that meets all of the HR department's requirements. What's more, the Doxis ECM platform generates added value for the entire business. HANSA-FLEX can add new applications quickly and easily and adapt them to current and future demands thanks to the flexible design-and-build approach. The result? More and more departments are reaping the benefits of digital solutions. HANSA-FLEX has already added automated inbound mail and invoice processing to its first ECM solutions, the Doxis archive and document management system. In 2016, the company began archiving its SAP data using the Doxis ECM solution, which archives data from departments including Purchasing, Production, Accounting and Sales. HANSA-FLEX has thus relieved the pressure on the SAP archive and ensured that all data is stored securely and traceably in line with legal requirements, including the German principles for properly maintaining and storing books, records and documents in electronic form and for data access (GoBD). Alongside company-wide solutions like these, the ECM platform also offers diverse department-specific options. The personnel eFile is just the start!

Next on HANSA-FLEX's digitalization agenda is the roll-out of ECM applications to further departments: The internal sales team already uses a digital contract management tool to capture and manage rental contracts. This solution will soon be extended to cover service and maintenance contracts and will later be made available to all departments — and that's just a few of the advantages of the flexible and extendible ECM platform. Also, HANSA-FLEX intends to add further eFile solutions such as integrated digital files in SAP for production-related documents to support the entire process: from the customer inquiry and the subsequent offer, right through to production. Digital customer, suppliers and material files are already being planned.

HANSA-FLEX's digitalization strategy is progressing in leaps and bounds. The international hydraulics specialist can extend the modular Doxis software solution in the future to incorporate further ECM solutions into additional areas across the company. HANSA-FLEX now has an innovative, forward-looking platform in place that will guide the company on its digital transformation journey.

See DOXIS in action

[www.doxis.com](http://www.doxis.com)