



eBook

Moving Your Critical Document Workflows to the Cloud:

What to Consider

Table of contents

INTRODUCTION.....	2
Why transform your organization's commercial and financial document management methods?.....	3
SECTION 1 – CHALLENGES AND RECOMMENDED APPROACHES.....	4
SECTION 2 – PLANNING FOR BOTH THE LONG AND SHORT-TERM.....	4
SECTION 3 – EVALUATION.....	5
SECTION 4 – CHOOSING THE RIGHT PROJECT.....	6
SECTION 5 – CHOOSING THE RIGHT PROVIDER(S).....	6
SAP Cloud Platform.....	6
AWS.....	7
Microsoft Azure.....	7
Google Cloud Platform.....	7
IBM Cloud.....	8
CONCLUSION.....	8
ABOUT SYMTRAX.....	9
ABOUT THE AUTHOR.....	9
Kirk Fackre — Director, Enterprise Solutions.....	9

Introduction

It's a rare company that is not moving away from proprietary on premise-applications toward Software as a Service (SaaS) and the cloud. Many are already well along this path which, while not always following a straight line, leads to opportunities for efficiencies at each stage. This e-book addresses some of the challenges you are likely to face as you plan for this journey, undertake it, and attempt to derive value from your investments.

We'll focus on one of the less glamorous, but most critical, subject areas, one that speaks equally to your customers and suppliers. If you have clicked through to this e-book, you already know we're talking about the D-word: **documents**, a.k.a. unstructured data, the black sheep of the data family.

Despite this reputation, documents are of data and from data, and are still the primary avenue for *meaningful* communication between businesses, customers, and internal stakeholders. When managed well, documents add *context* to what is being presented in a way that raw data does not.

Taking things one step further, we believe that a cloud architecture – whether public, private or hybrid – is the obvious place to store, manage, and share most documents and their related workflows.

Why? A robust cloud

- simplifies and promotes collaboration
- is easy to scale up or down
- is highly available, with built-in backups and failovers
- provides more security options, e.g. client and server side encryption, two factor authentication

Cloud migration often seems like a big hurdle to overcome, something organizations don't have the time to embrace fully given their many priorities. With this in mind, modernizing your document delivery strategy is a good place to start.

Document delivery implies that information is being *shared*, not just maintained for posterity. Document retention for compliance or historical purposes is also important (we will touch on this later in our platform recommendation section). We will be focusing on modernizing workflows relating to *commercial and financial* documents as these must be shared with stakeholders outside the four walls of your business and therefore lend themselves to cloud-based storage and collaboration.

Why transform your organization's commercial and financial document management methods?

- You will ensure that proprietary data is readily available, regardless of future platform decisions (more on this important point later)
- Doing so can quickly yield measurable results
- You can experiment and iterate, with minimal or no impact to your current business processes
- You will gain knowledge and comfort while advancing your overall digital transformation strategy

In the following sections, we'll explore how to plan and execute a document strategy designed to open new communication channels between you and your business partners. We'll also examine how to manage internal efficiencies.

This is especially relevant, since—at least for the foreseeable future—many companies will continue generating and sharing more unstructured data inside the organization than outside of it. We will not minimize the obstacles to modernizing legacy document processes: in fact, we will start by identifying some of the roadblocks you'll need to navigate on your path to efficiency.

Section 1 – Challenges and recommended approaches



Inspiration does not always lead to success: your project will compete with others for attention, resources, and the daily grind of getting your own work done. We will assume that you have executive sponsorship and some level of stakeholder buy-in, but how you get there is outside the scope of this e-book.

That said, knowing what to expect is essential. Among some of the challenges to implementing a new document strategy are:

- **Disruption:** Changing existing document management practices brings the fear of adjustment with it, as well as the related concerns of time and financial investment.

- **Inconsistency:** Any new technological overhaul will likely require reconciling disparate systems with each other. A modernization plan that doesn't respect this can complicate things and leave gaps between the old and the new.
- **Vulnerability:** Every work process needs an effective backup plan, and document storage is no exception. This can include the demand for high availability architecture to ensure business continuity.
- **Lifecycle failures:** Documents without defined paths can end up causing storage concerns along with redundancy issues as multiple outdated versions accumulate.
- **Meeting new requirements:** Governments and even large companies are now mandating [electronic invoicing](#) workflows requiring XML/EDI (so machines can read them) and PDF/A-3 (so humans can understand them).

Our recommendation is to implement a vendor-agnostic document strategy leveraging one of the cloud platforms we'll examine later. By doing so, you are free to swap out particular business applications while still retaining access to your critical data. Therefore, you're more likely to experience the following:

- **No disruption:** You can detach document production systems from storage and apply appropriate metadata to make them easy to find.
- **No inconsistency:** Your external document platform can easily connect with each of your internal systems.
- **No vulnerability:** High availability, automated backup and multithreaded connectors are key components of your next document platform.
- **No lifecycle failures:** Key metadata embedded in document properties and unique (GUID) links will help keep the document space consistent and easy to search.
- **Meet new requirements:** XML and PDF/A are the preferred data exchange formats for machines and humans and will remain so for the foreseeable future.

A modernization strategy leveraging the cloud will alleviate many of these concerns. This guide will outline some of the essential steps to establishing a new document workflow within the cloud that meets all of your needs, minimizes disruption, and delivers immediate value.

First, we will look at two approaches to cloud integration. While both are valid, your specific circumstances will probably point toward one or the other.

Section 2 – Planning for Both the Long and Short-term

One aspect we have yet to discuss is the manner of choosing an appropriate cloud provider for your migration. Whether AWS, Microsoft Azure, Google Cloud Platform, IBM Cloud, SAP Cloud Platform, or a different option, your migration will have to match your intended uses and software. The provider you work with to establish your new document workflow should ideally have the means to make this transition manageable, with an appropriate process ready to follow. As the work of a cloud transition will likely be ongoing, your company can build in some means of countering any chance of disruption.

We suggest a combination of present and future planning for successful cloud document management. This includes an active way to share files and define their destinations while also putting storage/archive protocols into action. Companies need to have both aspects of this in mind.

Section 3 – Evaluation



The plan you've laid out will be the full scope of the project, but just as important is the need to measure progress and adjust as matters proceed. Periodically during the process, you can assess how well your approach is improving in the following areas, among others:

- **Organization:** Has the storage method you've chosen improved productivity or made it more difficult to accomplish tasks? This can also be a measure of the lifecycle your company has put into place, since a proper workflow will account for storage.
- **Process time:** This metric tends to rank lower than cost or revenue for obvious reasons, but it's still important for determining the efficiency of your company's efforts.
- **Complexity:** A proper document solution should eventually have high availability and full support without the confusion of third party reliance. Outside assistance may be necessary at different stages but shouldn't prevent your company from achieving the final desired result.
- **Integration:** How successfully has the new software adapted to the cloud? An IBM Institute for Business Value study found that [60 percent of enterprises](#) use ROI calculations to prioritize their cloud initiative portfolio, with almost as many planning to measure the impact after implementation. Your guiding calculations can be different, but the goal should still be a proper assessment.
- **Expectations:** The ultimate benchmark may be your overall expectations and whether or not they need to change. Your company's evaluation schedule will vary but it should always include an appropriate review with the necessary stakeholders involved.

Section 4 – Choosing the right project

Where to start? You may already have a particular project in mind. Here are some workflows our customers have moved to the cloud that have made immediate impacts:

[Ditching attachments: Document delivery via unique URL](#)

[Commercial document insights: Read access notification regardless of email server rules](#)

[Leveraging eSignatures in your business: Mobile-friendly, ERP-integrated workflows](#)

[Cloud powered sales tools: Deliver highly personalized messaging from CRM or ERP](#)

Section 5 – Choosing the right provider(s)

It's tempting to choose a platform purely based on price, and many consumers do this with few reasons to regret it. B2C providers are primarily interested in locking users into their ecosystem, and offer free or low-cost storage to do so.

The reasons for doing this vary with each walled garden, even as the closed platforms partner here and do battle there. One obvious example is the interplay between Apple, Google, and Amazon. On the surface, Apple builds things, Google helps you find things, and Amazon sells you things. This being said, each has a cloud offering and all are converging in the areas of content creation, streaming platforms, and connected devices.

It's a bit like that in the enterprise space: SAP developed its own [Cloud Platform](#), then shifted the model so it can run on Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform. SAP learned – or to give them credit, already knew – that competing on price alone was not going to be much fun. To stand out, the platform needed to differentiate its features.

Let's take a quick look at each of these cloud options in turn.

SAP Cloud Platform

SAP has focused on enriching its [Foundry](#), including building out its library of connectors. Following this strategy, SAP announced its [Open Connectors](#) initiative at Sapphire 2018. This update means third parties could integrate applications into SAP more easily and get a simplified approach to authentication.

Benefits: Runs on other cloud systems; lets users plan for S/4 HANA; encourages experimentation and customization

Ideal for: SAP customers, future-proofers and forward-looking developers

AWS

With rock-bottom pricing, flexible plans, and industry-leading uptime guarantees, AWS is the obvious choice for many: Amazon has thrived by delivering a fluid user experience at near-commodity pricing.

Benefits: Affordable; can be tailored to specific needs; S3 storage has many of the same benefits

Ideal for: Organizations with existing ERP looking to modernize

Microsoft Azure

As of the summer of 2018, Microsoft is a recognized player in the cloud field, reaching a record share value. Its hybrid offerings may make it more desirable as that particular approach to the cloud attracts new partners. With cloud migration often a daunting prospect, a current Microsoft customer could find a lot to appreciate in this choice.

Benefits: Compatible with other Microsoft products; connected to SQL database; seems to be up-and-coming

Ideal for: Microsoft customer organizations

Google Cloud Platform

Alphabet has its own reasons for entering the fray as it pushes [G Suite](#) further into the enterprise space. Partnering with SAP in a more direct way than Oracle is a way of putting their thumb on the scale, probably due to Oracle having a competitive product. It will be interesting to see how this plays out in the coming years. As with other established name tech companies, Google's cloud entry can mean more to those who are committed to the brand.

A quick word about Google Drive, Alphabet's more consumer-focused cloud solution used by more than 1 billion people. Google Drive is so tightly integrated with Gmail that many users are barely aware of it. Trying googling the term and clicking the link: there is a decent chance you will see files you don't even remember saving. Google Drive is interesting, useful, and ubiquitous, but it is not a platform, at least not yet.

Benefits: Promotes security; set to run on private cable for better connectivity

Ideal for: Developing companies, businesses using Google's software



IBM Cloud

Finally, a few thoughts on the IBM Cloud. Like Google (but for very different reasons), IBM is promoting SAP on IBM Cloud. Unlike Google, they give equal space to Oracle on IBM Cloud. Our best guess is that IBM (or at least this part of IBM) is more interested in selling you boxes than enterprise software.

Benefits: Scalable; runs SAP applications; lets you separate web traffic by priority

Ideal for: Legacy ERP customers

Conclusion

Choosing the best enterprise cloud platform is clearly more about fit and less about price per terabyte. Furthermore, it's conceivable that large companies, like consumers, could benefit from different providers based on the specific needs of business units or functional areas. Much of the decisionmaking process will be driven by your current digital landscape and roadmap. Inevitably, price will enter the equation, but our advice is to go beyond ROI—or even TCO—and consider the specific use cases.

Are you running SAP and planning ahead for S/4 HANA? If so, SAP Cloud Platform is a good choice, especially as it can run on top of other Cloud systems. Are you trying to modernize a legacy ERP system? AWS, Azure or IBM will be good options in these instances. Are you a technology-centric or early-stage company using the G Suite? GCP is probably your best bet if so.

Whatever platform you select, make sure it plays well with other systems and makes it easy not just to migrate in but also away from it.

About Symtrax

Symtrax is a worldwide software company helping organizations enhance document management processes with cloud-ready solutions in mind. Our ever-expanding range of connectors establishes compatibility easily, and our Compleo Suite software can address a wide range of challenges through its specialized modules. To learn more, [visit our site](#) or contact us at sales@symtrax.com.

About the Author

Kirk Fackre — Director, Enterprise Solutions

Throughout much of his career, Mr. Fackre has concentrated on how technology helps organizations become more productive by capturing, organizing, and sharing critical knowledge, information, and expertise.

Prior to joining Symtrax, Mr. Fackre co-founded Airtime, a Mobile SaaS Solution provider, and ResearchAgent Corporation, where he pioneered a product line used to manage web content.

Upon graduating from the University of Massachusetts at Amherst, Mr. Fackre joined Equitrac Corporation, where he enjoyed a long and successful career in a variety of progressively responsible leadership and sales management positions.