

KENDOX

rossfeld

Stiftung Schulungs- und
Wohnheime Rossfeld Bern

STIFTUNG SCHULUNGS- UND WOHNHEIME ROSSFELD

CASE STUDY

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Stiftung Schulungs- und Wohnheime Rossfeld

Digitising personnel binders

The Stiftung Schulungs- und Wohnheime Rossfeld is a service provider and competence centre organised under private law to assist physically disabled people with their professional and personal integration. Its roughly 300 employees support the interests of the children, young people and adults who live, learn and work within the foundation. To make it easier to find employee information and improve its availability, the foundation adopted a digital personnel binder. Thanks to Kendox InfoShare digital personnel binders, over 700 binders relating to current and former employees have already been digitised and appended with relevant search terms.

- Customer**
- Stiftung Schulungs- und Wohnheime Rossfeld
 - approx. 500 residents
 - of which 70 are employees
 - headquarter in Bern
 - over 700 binders

- Industry** Foundation, educational centres and dormitories

- Project**
- Digitise personnel dossiers for HR
 - Integrate with ERP system Proffix
 - Standardise personnel records
 - Simplify access and visibility

- Requirements**
- Integrate with Proffix
 - Extremely large dossiers
 - Preserve existing record structure
 - Option to call up COVID certificates
 - Sensitive, confidential data

- Benefit**
- Push digitisation forwards
 - Easier access to dossiers and dossier visibility
 - Access any time, anywhere



Rossfeld, a foundation for social inclusion, was founded as a private foundation in 1960. Even then, it was a leading light, providing a modern institution for physically disabled people in Switzerland. The foundation allows people to live, work, and receive therapy and training all in one place. For over 60 years, it has stood for an innovative approach in this field. Based in Bern, the Rossfeld foundation helps its residents, from children to pensioners, to integrate themselves personally and professionally. In order to drive forward the process of digitisation within the foundation, its primary goal was to digitise employees' extensive dossiers, which had until now been maintained on paper. The aim was to make it easier to access these documents and for HR staff and disabled employees to view them. The document management solution Kendox InfoShare, which was already integrated into the foundation's existing ERP system Proffix, was chosen as the ideal solution. Right from the start, it was able to provide clear benefits for everyone involved.

SPECIAL REQUIREMENTS LEAD TO DIGITAL SOLUTIONS

Rossfeld offers schooling, professional training, work, housing and therapy, which means it can be a home and place of activity for its residents for a very long time. Since the foundation's extensive paper records were kept in various buildings spread across its extensive grounds, returning them to their proper place was a difficult and time-consuming task for the foundation's numerous wheelchair-using employees. The whole process, from retrieval to viewing, proved to be complex and troublesome. It was therefore decided to implement a central, permanently accessible digital dossier storage solution.

Constant access to personnel records is particularly important for senior staff and therapists in institutions like Rossfeld, as dossiers are essential to see, for example, the type(s) of disability a given resident has in order to ensure that they get the proper care and treatment. In the wake of the pandemic, it was also important to be able to access an individual's COVID records at any time. The new solution needed to make all of this possible digitally. Extra attention was also paid to the subject of data protection, since all patient data needed to be treated with maximum sensitivity and confidentiality, and access to it needed to be restricted in specific ways. In terms of therapy, which is one of the services offered by the foundation, there are yet more patient data protection regulations to adhere to.

INTEGRATION WITH ERP SYSTEM

The Rossfeld foundation uses the software solution Proffix as its ERP system. This software was already able to interface with Kendox InfoShare. It was implemented by Wato-Soft AG, which is a partner of both Proffix and Kendox. "Proffix is sort of the foundation's heart," said Barbara Mani, Head of Services at the Rossfeld foundation. "Among other things, it provides customers, residents and suppliers with the relevant personal data. We also use it for salary accounting. Connecting this centrepiece to Kendox's solution – that was simply the best thing to do."

By integrating Kendox InfoShare with Proffix, all sorts of data such as names and dates of birth could be transferred directly from the ERP system. Kendox integrated the original paper documents for each dossier in the form of a digital binder cover. The goal of the project was to provide a harmonious counterpart to Proffix, in order to drive forward the digitisation process in HR and, long-term, across the whole administrative department. Thanks to Proffix's existing interfaces with Kendox InfoShare, the solution could be implemented quickly and without any significant blockages.

“Everyone could quickly see the added value and new benefits that Kendox’s solution brought,” said Thomas Wagner, Managing Director at Wato-Soft AG. “The result is a modern, timely solution which borrows the structure of the digital dossiers from the structure of the paper originals.”

Specific customer needs and requests could also be taken account of.



SCOPE OF DIGITISATION FOR HR

The number of “active” dossiers, that is to say the dossiers of employees who are currently working at the foundation, was approximately 300 at the time the solution was integrated. These were given priority for digitisation early in the project. However, because the dossiers of former employees also need to be kept for longer periods of time, these also needed to be digitised eventually. In total, therefore, around 500 dossiers needed to be digitised. In the course of the digitisation process, it was also determined that a number of dossiers were duplicated. This had made it much harder for employees to maintain these records in the past. The digitisation process made it possible to eliminate these duplicate dossiers. The use of a central digital archive will make it difficult for new ones to pop up in future. Thanks to Kendox’s solution, users can now also access the digital dossiers from anywhere, at any time. Newly added documents can be quickly scanned and added to the appropriate digital dossier.

“Thanks to Kendox InfoShare, dossiers are easier for administrators and employees to find and access,” said Patrick Warrisch, project lead at Kendox. “The digital file stores can also include timers – for example, to remind users that a temporary contract is about to expire.” Authorised users can also request COVID certificates via Kendox InfoShare. Using the Kendox Scan solution, all PDFs can be scanned in the correct orientation. Now, whatever employees need to do with a dossier, they can do it directly from their workstation. This means they no longer need to make the long, difficult journey to cupboards and cabinets in other parts of the institute – something which always posed significant challenges for physically disabled employees.

On the subject of data protection, Barbara Mani, Head of Services at the Rossfeld foundation, added: “A detailed, refined permissions system was also implemented using the Kendox Standard Security Plugin module, and it works perfectly.”

A CONVINCING IMPLEMENTATION

The decision to go with Kendox as the solution provider was made quickly, without the need for a time-consuming evaluation round with multiple other providers. “The solution needed to stay ‘in the family’,” explained Rossfeld’s Head of Services. Given Kendox’s existing collaboration and integration with Proffix, the conditions for its use were already met. “This decision proved to be a good one right from the start of the project, as our collaboration was always prompt, constructive and consistently successful.” Thanks to Thomas Wagner, Managing Director at Wato-Soft AG, and Patrick Warrisch, project lead at Kendox, the solution was developed quickly in line with the specification sheet. Despite a slight COVID-related delay at the start, the total time to implement the project was pleasantly brief, meaning that the foundation’s employees did not have to wait long for the dossiers to be digitised and their jobs to be made easier.

During the implementation process, one Rossfeld employee in particular with a specialist workstation for scanning documents proved to be particularly helpful and was able to complete the whole task nearly alone – something of which Barbara Mani is very proud. There was one other feature of the project which made things proceed significantly quicker. The dossiers were sorted into groups such as applications, miscellaneous documents, correspondence and salary calculations. These groups were assigned barcodes. The barcodes made the scanning process much easier, allowing all active dossiers to be digitised in just under three months. Once implemented, the solution helped make all the employees’ jobs much easier, and the benefits were clear at a glance. Thanks to Kendox’s document management solution, accessing personnel dossiers became faster and easier. Kendox InfoShare can also be used at any time, from anywhere.

Thomas Wagner, Managing Director at Wato-Soft AG, explained the key benefit: “Employees can access the information at any time, from anywhere, using a web client that runs in a browser on their laptop. This is a big step forward which we have realised with Kendox, making it possible for people in the foundation to work on the move.”



FUTURE PROJECTS FOR EVEN GREATER LEVELS OF DIGITISATION

Further digitisation measures are also planned with Kendox. “In early 2022, we want to start constructing what we call ‘client dossiers’,” said Barbara Mani. “In future, we want to manage document templates, controls and deadlines via Kendox. Since many of our residents live here from childhood, complete their professional training here and then end up working at specialist workstations within the foundation, it would be enormously valuable to have a digital overview of a client’s entire life.”

Naturally, this means that all personal data needs to be treated with extreme sensitivity and confidentiality. Kendox was also able to convince the foundation with its solutions in this area. As a result, the future plan is for all clients’ childhoods, schooling and professional history with the Rossfeld foundation to be mapped digitally, with access rights personalised and secured with Kendox’s help. All those involved in the project remain in good contact with one another, and another joint project for digitising document-based processes within the Rossfeld foundation is planned for the near future.

ABOUT KENDOX

Kendox are the experts in digital document management and process automation for offices and administrative bureaus. With years of experience providing solutions using its own in-house technology, Kendox works in particular with customers in industry and manufacturing, trade and e-commerce, services, and logistics as well as with public institutions, schools and universities.

Kendox's applications are supplied and operated in the cloud from the company's own virtual data centres in Germany and Switzerland. Its software solutions are based on forward-looking technologies and meet today's security and data protection requirements.

Kendox's document and process automation solutions integrate with Microsoft 365, leading ERP solutions and many other specialist applications. Thanks to Kendox's collaboration with other solution providers and integration partners, the Kendox software platform works in any number of diverse use cases.

Kendox AG is based in Oberriet, Switzerland. Branch offices, as well as sales and consultancy offices, are located in Oberhausen, Germany; Vienna, Austria; and other locations in Germany, Austria and Switzerland. Together with its partner network, Kendox provides ongoing support to over one thousand customers.

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