KENDOX

Evangelische Kirche
im Rheinland

EVANGELICAL CHURCH IN THE RHINE-LAND

CASE STUDY

Date   21.09.2023

Evangelical Church in the Rhineland (EKiR)

EKiR provides support with Kendox InfoShare acting as a unifying DMS

The Evangelical Church in the Rhineland (EKiR) is the second-largest of the 20 regional member churches of the Protestant Church in Germany, with over 2.2 million members across 627 parishes as of January 2023. The area covered by the church includes parts of the federal states of North Rhine-Westphalia, Rhineland-Palatinate, Hesse and Saarland. It includes 37 church districts, most of which operate autonomously. To support the work of church districts and parishes, and the collaboration between different layers of the church, EKiR provides the software solution Kendox InfoShare, a unifying document management system (DMS). Integrated into the central EKiR portal as a web-based application, this DMS lets employees access documents that are not available in specialist applications with integrated archives.

Customer	– 627 parishes – 37 church districts – Over 2.2 million members
Industry	Public body
Project	– Central document management system – Revision-safe archive
Requirements	– Integrate with Wilken P5 commercial software – Interface and integrate with groupware solution Kopano – Integrate with central EKiR portal

Most church districts do not (or did not previously) use a DMS solution. Documents are stored in various formats and structures on the districts' own servers, and do not always conform to EKiR's document standardisation plan.

Following requests from the church districts' administrative bodies, the church office's IT department identified a strong need for a central document management system. A feasibility study supported by representatives from the various districts helped firm up the exact requirements, after which the project was set in motion. Following the regional synod in January 2021, the project was able to begin in Q2 2021 with an initial group of pilot districts.

PROJECT GOAL

The Evangelical Church in the Rhineland provides a unifying document management system to all of its church districts. This new system needed to meet the most important needs of a range of church districts to support their respective workflows and collaborative processes. At the same time, it also needed to promote standardisation within EKiR, increasing process efficiency. It was also important to enable revision-safe document storage, creating a basis for the long-term goal of eliminating paper-based records. A central DMS would also remove the need to use internal emails to send and receive documents and information.

In its final form, the DMS should be in use at the church office in Düsseldorf and in as many church districts as possible. By 2024, all interested church districts would have the option of participating in the rollout, but could decide for themselves whether they wanted to use the Kendox InfoShare system.

"We are striving for a shared system whose structure and functionality are highly standardised. The document management system acts as a kind of collection plate for all the documents that aren't managed within a specialist application," explained Britta Franke, Regional Church Chair, who led the implementation project. "For example, we can use it to store documents related to committee meetings, procurement, or construction and properties."

REQUIREMENT ANALYSIS AND SELECTION OF PROVIDER

The initiative started with the administration managers' group for the church districts' administrative offices. Based on their direction, a working group preparing for the project analysed the exact requirements for a shared document management system. This group, consisting of representatives from the individual church districts as well as the church office, also developed a list of benefits that a standardised document management system would offer for the Evangelical Church in the Rhineland EKiR received support right from the beginning from the organisational consultants HLP, and it continues to work to this day with HLP's Annette Hochstrahs.

Following a preliminary study, EKiR conducted a feasibility study, as part of which it issued a limited invitation to tender to those DMS providers with which it already had contacts and good past experiences. Kendox InfoShare was already in use in each church district, including as a legally compliant archiving system for the church office via the commercial software Wilken, which is used to store all of the organisation's invoices.

Following a comprehensive evaluation of the range of providers, EKiR chose Kendox as its DMS partner. Kendox won in particular thanks to its usability and high integration potential with the existing EKiR portal. Project lead Britta Franke also particularly appreciated "the team spirit we had with Kendox, as well as the shared company and project philosophy".

MULTI-PHASE PROJECT IMPLEMENTATION

The first phase of the project began in April 2021, when the system was implemented in the church districts of Duisburg, Dinslaken and Trier. Additional church districts who choose to use the system, as well as parts of the church office, will follow in subsequent phases to be completed in 2024. Kendox InfoShare is initially seeing use in church districts' administrative offices. It will later be integrated at parish level, in the parish offices and elsewhere such as for presbytery members.

"The DMS now offers a long-term shared platform for both professional and honorary colleagues. It will not just promote digitisation and standardisation within Rhineland churches, but is also environmentally friendly and sustainable," mentions the project lead. Users can access the system via the EKiR portal. "This means that even those who work from home can still access documents wherever they are," says Britta Franke.

ROLLING OUT ONE "WAVE" AT A TIME

The timetable for implementing the DMS is divided into four phases.

Phase 1, the pilot phase, lasted from April to September 2021. In addition to integrating the DMS into the EKiR portal, this also involved implementing the solution in the first three pilot church districts of Duisburg, Dinslaken and Trier. An EKiR document standardisation plan and metadata-based document search were set up. A support system was implemented, as were all the functional requirements, use cases and business processes each church district would need.

Phase 2 (the expansion phase) ran from October 2021 to March 2022, during which time the system grew to cover four additional pilot church districts.

Phases 3 and 4, and the subsequent rollout phases, are planned for the 2022-2024 period. These will involve gradually integrating more and more church districts in waves of two to four at a time. Each wave will start using the solution at the same time. For each church district, a rollout phase is planned during which the system will be introduced and all the organisational measures needed by each individual district will be defined and implemented.

Drawing on the system settings established during the pilot project, the functional requirements for use will be expanded and any additional variants required to meet those needs will be added – for example, scanning incoming post, expanding the range of roles in the permissions plan, and additional ad-hoc workflows. The system will also eventually support additional business processes that will be implemented for all users.

"Each wave takes around four to five months, with the rollout phase starting with phase 3. The project is currently in wave four," explains project lead Britta Franke. "So far, the system is in use across eight church districts (administrative offices). The rollout is continuing to additional church districts and invoicing stations within the church office. We have already received expressions of interest from other church districts for our next wave, scheduled to last from this autumn to January next year. This gradual implementation of the project is due to be completed by the end of 2024. We aim to have at least 15 church districts using the solution by then."

IT REQUIREMENTS AND INTERFACES

During the implementation process, interfaces needed to be established with existing IT solutions. These included the commercial software Wilken P5 and email integration with the groupware solution Kopano. Beyond this, integrating Kendox InfoShare into EKiR's existing in-house portal solution via single sign-on was of central importance.

All documents for which a specialist application exists remain with that application – for example, in the HR or accounting systems. Kendox InfoShare serves as a central repository for all documents that have no associated specialist application. Kendox InfoShare includes an EKiR document standardisation plan which ensures that documents are stored according to a standardised structure. Each church district decides for itself which documents to store according to the plan, and in what amount. The regional church provides the project structure and ongoing support during implementation; the church districts themselves choose how to implement and adapt their processes on-site.

FUNCTIONAL REQUIREMENTS

Kendox InfoShare needs to be used as a central, revision-safe DMS. The church-specific document plan (the EKiR document standardisation plan) is therefore implemented directly within the DMS. As well as extensive search functionality, existing documents, document plans and simple workflows are also supported. The "Processes" function also supports EKiR's internal management processes.
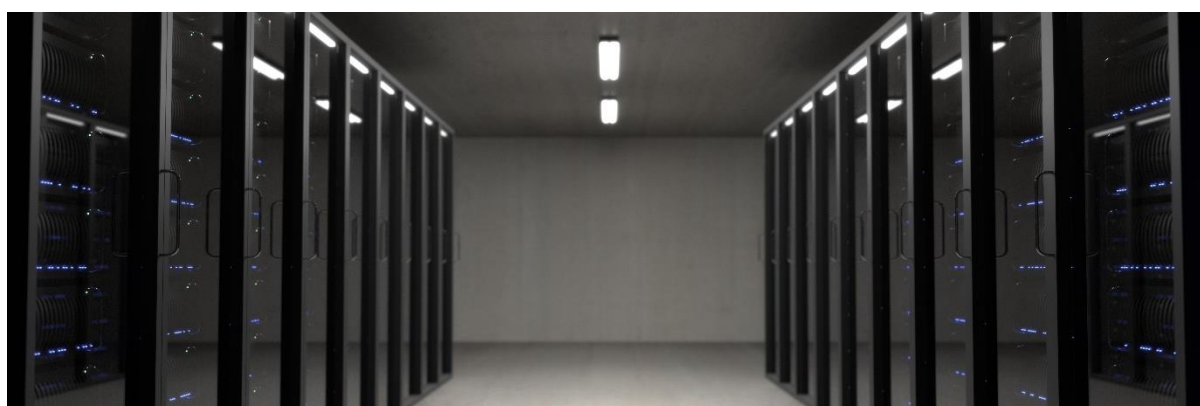
MAKING TASKS EASIER AND OTHER BENEFITS

The church districts already using Kendox InfoShare are benefiting from the standardised storage system. This will make future collaboration between church districts much easier. Documents can also be stored in a revision-safe system, enabling a long-term goal of eliminating paper-based documents. Workers within each church district have access to the system from anywhere, including their home offices.

Project lead Britta Franke explains why she's so satisfied with the benefits of this standardised DMS: "The church districts and organisational units that use this solution can work digitally, reducing the amount of paper- and email-based communication. Structured document storage is now also possible. Document versioning is particularly useful in our day-to-day work. It makes it easy to work with "living" documents which see multiple people adding information to them over time. The DMS always has the latest version, which largely eliminates the need to email documents around."

FUTURE PROSPECTS

As of May 2023, around 230 EKiR users are already working with the system, and the number of church districts using it continues to grow. Although the number of users so far is lower than expected, the number of church districts participating is actually higher, explains EKiR's project lead Britta Franke. "The change management process requires a lot of time on-site. We're providing support with the implementation process. There are regular project exchange meetings, and support is also provided for designing tasks, like setting up document structures and processes. As well as training for key users before each wave of the project, there are also training sessions for every user who will eventually work with the system. These have been very well received."

The collaboration with EKiR has been a success story for Kendox, too. Kendox project lead Joachim Breuer explains: "We are really pleased to be able to help improve and simplify the document processes here, and to make day-to-day work easier for the many professional and honorary colleagues of the Evangelical Church in the Rhineland."

The next step to come is wave 5, this autumn. Additional waves are planned for January/February and autumn of next year. Some church districts are also planning rollouts within their parishes in 2024.

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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