



E easy
by conrizon



REFERENCE STORY

missio: international aid projects
with document management
from easy





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about missio

missio is the International Catholic Mission Society, a non-profit organization within the Pontifical Mission Societies. The aid organization works closely with church partners in Africa, Asia and Oceania to help people help themselves. In other words: Motivated by Christian principles, *missio* supports its partners' projects in the areas of emergency aid, pastoral care, social work, education, health, human rights and religious freedom. In Germany, *missio* raises awareness of global justice and the interests of its partners through educational work and campaigns.

980 aid projects on three continents

Helping disadvantaged people in Africa, Asia and Oceania is the declared goal of the Catholic aid organization *missio*. This manifests itself in such forms as a home for street children in the Philippine metropolis of Manila, the renaturation of coral reefs in Papua New Guinea or a training center for female smallholder farmers in Tanzania. These three aid projects are just a small selection of *missio*'s current projects. The aid organization currently supports a total of around 980 projects in more than 60 countries.

missio finances these projects with donations and therefore relies on transparent and efficient processes when allocating the funds. As a non-profit organization, *missio* also has to follow commercial accounting rules, and the association has its work audited every year.

easy's portal solution prevails

Project work at *missio* is coordinated by the international department, which has been headed by Frank Kraus for 16 years now. Project management was already partially digitized when he joined *missio* in 2009. Project information was already stored in a database in the 1990s, followed by the switch to software-based project management in the 2000s. Over the years, however, this application eventually outlived its usefulness as it could not depict the process in its entirety and was not completely paper-free either.



So a new document management solution had to be found that would provide a simple and intelligent way to digitize one of *missio*'s central tasks: the project work. Before the aid organization set out to find a specific solution, it called in external process consultants from RWTH Aachen University: "We worked with these organizational developers to outline all the processes we have in the international department and convert this outline into a specification sheet. We began by discussing the type of process and the process paths."

On this basis, the external consultants contacted a number of software providers, three of which were shortlisted and subsequently assessed by *missio* itself. In the end, easy was chosen on the basis of its convincing presentation. This solution best met the requirements that *missio* had set for a document management system to handle the administration of aid projects. The easy solution was designed as a portal with a document archive that users can access via IDs with various rights. The documents in the portal are also linked to fixed workflows for processing.

complex requirements profile due to international projects

The exciting thing is that *missio* ultimately needed more than basic off-the-shelf document management because the processes it has to depict are very complex. The inherent complexity in managing the projects arises in part because the organizing system

"always has to be quadrilingual and must factor in the differences in intercultural communication when addressing the various partners,"

explains Frank Kraus.

There are also extensive interfaces, such as to the ERP system easyDOOR, where the master data required for the project work is stored, as well as to other applications, such as an application submission tool, where the project partners enter their data in the first project phase when applying for the financial aid provided by *missio*.

Petra Wunsch has been involved in project work for *missio* for five years. She uses the software on a daily basis and also acts as a contact person for all matters concerning digital document management in the international department. She explains the importance of the document management system from easy for the project work:

"Today, we use the software for all project work – from the application process to reporting. Our workflow is as follows:

After a partner has submitted an application for a project and it has been entered into the system, the project review is carried out directly in the system by the international officers. They can send the partners suggestions for changes and adjustments right there in the system. Once all arrangements have been made on the digital platform, the project is forwarded to the missio award conference. If approved, easyDOOR will then be used to initiate the disbursement of project funds, create reports from the partner and carry out audits. Finally, all documents are archived in the easy software."



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software for
yourself**



individual solution from easy also impressive in practice

When setting up the software with the easy team, Frank Kaus was impressed by the extent to which easy's document management software could be tailored to *missio*'s requirements, some of which were highly individual:

"There were sub-functions that had to be implemented in a very specific way, because they dealt with accounting matters such as cost or financing plans, for example."

The head of the international department offers an example to explain the required specification work:

"We work with well over 100 different currencies in our projects, all of which have to be converted in the software. The data for this has to be kept up to date at all times to be added up and summarized in the cost plans, which may well contain 40 to 50 items."

technological leap for aid projects

At *missio*, all employees involved in awarding projects work with easy's document management system. Frank Kraus does not hide the fact that there were also skeptical voices among colleagues when the entire workflow was migrated to the software.

In practice, however, this skepticism quickly evaporated:

*"The software is easy to understand and clearly structured.
This was also the feedback I received from my employees.
And after just a few months, even the skeptics were saying,
"Wow, look at how much we can do now!"*

Looking back, he comes to this conclusion:

*"The introduction of the easy software
means a technological leap for us!"*

Around 90 percent of *missio*'s project partners are now also working with the software. They are able to access the portal with the document management system via a browser using a special user account. Petra Wunsch reports that there was initially a certain amount of skepticism on this side as well since the partners *missio* works with all have very different cultural backgrounds and speak many different languages.

In the meantime, however, collaboration via easy's portal solution is running smoothly – in part because the interface comes across as being very intuitive. If any questions come up, *missio* has "set up a small support team that can be contacted by email."

In addition, "handouts with short instructions have been prepared for the project partners, explaining what needs to be filled in and what needs to be taken into account."

the four major advantages of easy's portal solution

In summary, Frank Kraus emphasizes four major advantages of the portal solution that easy has created for the document management side of *missio*'s important project work:

- Firstly, it enables a high degree of mobility and easy access. This means they can access documents and processes from any place and at any time via the portal – even using a smartphone.
- Secondly, all communication concerning the projects has become clearer and more transparent: Everyone involved is always up to date, which prevents many misunderstandings.
- Thirdly, workflow control has improved significantly because the processes are clearly defined and can be tracked transparently. This makes the familiarization process much faster when staff changes and provides a better overview of upcoming tasks.
- Fourthly, the switch to the portal has also increased security: The portal system acts as a kind of "safe haven" for *missio* in the current communications landscape as it offers very good protection against the alarmingly high number of almost perfectly designed fake emails that are received by an aid organization like *missio*.



easy DMS

**let us demonstrate
the software to you**

- ✓ User-friendly interfaces: intuitive and easy to use
- ✓ Efficient workflows: save time and resources
- ✓ Smooth information exchange: promotes collaboration within the company
- ✓ Work more effectively with artificial intelligence

“we mainly finance our work through professional fundraising. the new system makes life much easier for our fundraisers. in the past, they always had to search for the information they needed across many paper files and borrow the folders. today, they can search the system themselves for projects that are important to them. and they can use the full-text search to find all the information on their own relatively easily and prepare it for their presentation.”

Frank Kraus

Head of the International Department
at *missio*



As digitalization expert and leading ECM software manufacturer, easy has since 1990 stood for legally compliant, digital archiving and efficient, automated business processes. Over 5,400 customers in more than 60 countries and all industries rely on our company and our strong partner network. Our first-class archiving, ECM, DMS, P2P and HCM software solutions & services form the digital center for data-based intelligence and make people, companies and organizations successful. easy is part of conrizon AG, the European holding company for market-leading ECM brands such as PROXESS, HABEL, and Shareflex.



easy DMS

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Document Management Software:
manage documents easily and
efficiently.