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CHECKLIST  
REPORT



# Automation & AI-Powered Document Management: Transforming Knowledge Work for the Digital Age

# Modern Document Management Boosts Knowledge Sharing

By Marydee Ojala, Editor-in-Chief, *KMWorld*

Consider the humble file cabinet. Long ubiquitous in offices and homes, it epitomized early document and information management. Locating that file folder with the relevant paper document was once the pinnacle of search success. The transformation from physical file cabinets to modern knowledge management and sharing continues, but redefines, the entire notion of search. As paper documents gave way to electronic versions and storage is now digital, the definition of what constitutes a “document” becomes fuzzy and document management takes new dimensions.

Modern document management is not limited by linear organizational methods. It’s not hierarchical, not grouped alphabetically, nor is information available in only one location. Liberating documents from file cabinets has enhanced our ability to share knowledge for some years now, particularly as enterprise search capabilities have expanded. Most recently, the application of AI technologies to document management and knowledge management have flourished. As Ville Somppi, M-Files’ Vice President of Industry Solutions, notes, the digital workplace requires automation. Without modern knowledge automation platforms, organizations inevitably fall behind.

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While individuals expect seamless access to information in their personal lives, when they get to work, they frequently find that their organizations struggle with fragmented data systems, inefficient document processes, and the dreaded silos of information. Granted, what individuals search for at home is often very different from what they search for at work. Yet modern knowledge work automation (KWA) platforms should be able to replicate, at least in part, what users want—quick, accurate answers to work-related queries. They want work searching to mirror what they experience at home.

## MOVING BEYOND THE PHYSICAL ENVIRONMENT

Today’s KWA platforms are not only a far cry from physical filing cabinets, they also introduce wholly new approaches to information management. The growing complexity of the information that needs to be made accessible necessitates reliance on automation. When a “document” could be an email, a video, a chat transcription, an audio

file, images, survey results, or other unstructured information, the filing cabinet paradigm is obsolete.

Modern knowledge management systems rely on metadata and AI-generated tagging to allow multiple organizational views of the same document. Plus, scanned documents and images can be converted into searchable text using OCR (Optical Character Recognition) technology. Take a contract, for example. It could be of interest as information about a client, a particular type of legal documentation, or a particular project. With a modern KWA platform, that document can reside simultaneously in different places, reflecting the various interests. Additionally, NLP and semantic search mean that users can locate documents based on content, context, and relationships. It’s a fluid approach, not reliant on a previously determined, static taxonomy.

Another valuable element of modern KWAs is their encouragement of collaboration, which is at the heart of knowledge sharing. This doesn’t stop at simply allowing multiple people to work on a document. M-Files thought a lot about version control, which has been an issue for effective knowledge management for years. Users check in and check out. When they check out, it creates a new locked version that other people can’t change. If someone tries to make a copy, they are warned it’s a duplicate. Users are also encouraged to send links to a document—not the actual document—to avoid complications regarding which version is which, retain access control, and have auditability.

Security comes in for scrutiny when considering KWAs. Access to paper documents stored in file cabinets was secured by a lock and key. And woe betide you if you lose the one and only key to a filing cabinet lock. Today, security is automated. Sophisticated permission systems can automatically adjust access based on roles, projects, document sensitivity, and regulatory requirements. Sensitive documents are encrypted. An audit trail is in place. Thus, the security is vastly more effective than a lock and key.

## SEARCH BEHAVIOR

Search behavior is a key factor influencing information management. Even simple queries can become complex surprisingly quickly. Suppose a customer service agent needs to respond to a customer request for the exact specifications for a particular part. The customer has the part number, but unless that was included in the metadata assigned to the document containing the specs, finding the information was a nightmare for the agent prior to AI implementations. AI enables searching within documents to surface data that was previously difficult—and sometimes impossible—to find.

Factual queries can frequently be answered by accessing one document—and it helps if you know exactly what you want. However, if searchers aren’t entirely certain about what they are looking for or have a complex information need, their answer could be obtained from multiple documents. Search becomes a process rather than traditional information retrieval. The end result is a synthesis of information found in those multiple documents.

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Here again, AI adds capabilities previously impossible as it learns more about individual search behaviors.

Search behaviors have changed over time, largely because the search engines have changed. It’s less about keywords and much more about semantics, about understanding intent, and about expecting an answer rather than a list of links. The multiplicity of devices people use for searching also affects search behavior. When search is perceived as just another app on a mobile phone, people approach it differently than when they choose to go to a search engine like Google or DuckDuckGo.

In today’s search environment, a challenge is to design the user experience in a way the user, either intentionally or unintentionally, aids the system to know what is wanted during this search session.

And it’s kind of our challenge as the software industry to design the user experience in a way that the user can either intentionally or unintentionally aid the system to know what you want this time.

Search is, of course, a means to an end. It is the path to finding necessary knowledge, not the knowledge itself. What’s important here is the ability extract knowledge from documents. They can be automatically analyzed for insights and related content can be surfaced proactively. Content can be repurposed and synthesized into new formats. AI allows knowledge to be found in ways that couldn’t happen with older search technologies.

Let’s return to the example of the customer service agent responding to the customer who has a part number. Suppose the number didn’t get included in metadata. But it’s mentioned in a 300-page manual. AI *does* enable searching within documents, but the problem is knowing which document contains the needed information. Newer iterations of AI-powered search can locate that part number extremely quickly, even when the agent doesn’t realize it’s in that particular manual.

How about contracts? Suppose you want a full picture of contracts between your company and a specific client. Sounds simple, but it becomes complex when companies have changed their name, merged or acquired other companies, or are known by an acronym instead of their full name. Master Data Management (MDM) can combine unstructured data with structured data to correlate the various names with records in the system. One change in the MDM and all documents are automatically updated. Unique IDs can transcend the names to pull together all the contracts related to the entity under consideration.

Additionally, if the result of the search is beyond contractual, but a more general inquiry about any sort of relationship between your company and a specific client, perhaps to forestall accusations of conflict of interest or to do background checking, you’re looking at combing through tens of thousands of documents. This is not a manual task, but requires an AI-driven approach.

User expectations for enterprise search are high. With Microsoft, a major presence within organizations, enterprise search happens with SharePoint. M-Files is cognizant of this and integrates deeply with Microsoft 365, wanting the user experience and workflow to be as seamless as possible. This includes a SharePoint Connector to organize documents across all SharePoint servers, Outlook integration to manage documents directly in Outlook, an add-in

for Teams to provide unified access to enterprise data and enhance collaboration, and an integration with Copilot, Microsoft’s GenAI implementation. Copilot can summarize email content, transcribe meetings, conduct market research, analyze regulations, and create new documents (it did not create this one).

## KNOWLEDGE AUTOMATION CHALLENGES

Automating knowledge work and document management is not without challenges. As the definition of what constitutes a document becomes increasingly fuzzy, the technological challenges of making that content findable increases. GenAI is certainly helpful in this regard but it, too, faces challenges and is in continuous improvement mode itself. Unstructured data, in all its guises, can still be problematic for enterprise search.

Knowledge locked away in silos that do not connect to other silos is a persistent problem. For effective access to information that, in turn, leads to better decision-making, connecting siloed information is essential. Data integration strategies intensify the smooth flow of information among silos.

Data privacy and confidentiality present their own set of challenges. Security is not limited to controlling access to information. With GenAI particularly, it’s important to have guardrails in place so that an LLM only accesses authorized, not protected and proprietary, data and does not share internal data externally. Confidential data should stay just that: confidential.

GenAI does not replace humans involved in content curation. Knowledge management systems rely on up-to-date information and high-quality data sources. Quality never goes out of style regardless of advances in AI technologies.

## THE AI ERA OF DOCUMENT MANAGEMENT AND THE KNOWLEDGE WORLD

Transforming document management from being paper-based to digitized to AI-powered (and powerful) searchability has moved expectations from storing documents to dynamically assembling and presenting information in whatever format best serves the needs of the searcher. It’s a shift from document storage to knowledge enablement, from where information is stored to how knowledge can be accessed and leveraged to increase institutional intelligence.

AI technologies have revolutionized how knowledge work happens in this new digital age, but they haven’t yet quite achieved the ability to read our minds, although they sometimes seem to do just that. Regardless of expansions in format and storage of information, the notion of the perfect search lives on, as does that remnant of the physical file cabinet—the file folder icon on your desktop. ■



Marydee Ojala is editor-in-chief of *KMWorld* magazine and is conference program director for Information Today, Inc. She works on conferences such as Enterprise Search & Discovery, *KMWorld*, Data Summit, and AI & ML Summit. She is a frequent speaker at U.S. and international information professional events. In addition, she moderates the popular *KMWorld* webinar series.

# Automation & AI-Powered Document Management: Transforming Knowledge Work for the Digital Age

BY Ville Somppi, Sr. VP Industry Solutions, M-Files



In today's digital workplace, the complexity of information management within companies has reached unprecedented levels. This complexity stems from the exponential growth of data, the variety of information formats, and the need for compliance with ever-evolving regulations. Companies are inundated with vast amounts of data from multiple sources—

emails, documents, conversations, and more.

Managing this data efficiently is a daunting task, often leading to information silos, duplication, and data loss.

Contrastingly, in our personal lives, searching for information is often intuitive and seamless. Whether it's using a search engine, navigating an app, or asking a virtual assistant, we expect quick and easy access to the information we need. These tools serve up content and information they deem relevant to us based on our interests and behavior. This stark contrast highlights a significant disconnect between the user-friendly tools we employ daily and the often-cumbersome systems in place at many organizations, where knowledge workers often must battle with legacy systems, complex folder structures, and scattered information to find what they need to get their job done.

This disconnect underscores the urgency for companies to adapt their information management strategies. To stay competitive, attract and retain top talent, and foster collective intelligence, businesses must provide their employees with tools that mirror the intuitive experiences they are familiar with. Employees now expect the same level of efficiency and ease in their professional lives as they do in their personal lives. Quick access to information is not just a convenience; it's a necessity for boosting productivity and maintaining a competitive edge.

## WHAT IS A DOCUMENT MANAGEMENT SYSTEM (DMS)?

A Document Management System (DMS) is a software solution designed to store, manage, and track electronic documents and images of paper-based information. It provides a centralized repository where documents can be easily accessed, shared, and collaborated on by authorized users. Key features of a DMS include version control, metadata tagging, search functionality, and security protocols to protect sensitive information.

Implementing a document management system can streamline processes, boost productivity, lower costs, and minimize a company's environmental impact. Additionally, by centralizing information, a DMS can improve collaboration and communication among individuals and teams, no matter where they are located.

## INVESTING IN MODERN DOCUMENT MANAGEMENT SYSTEMS

Investing in a document management system that offers intuitive search capabilities, seamless integration with other tools, and

robust security features is crucial. These systems can help break down information silos, reduce data duplication, and ensure that employees can find the information they need when they need it. By aligning their information management practices with the expectations of today's workforce, companies can enhance productivity, improve employee satisfaction, and ultimately drive better business outcomes.

An evolution of document management systems are knowledge work automation platforms (KWA), that integrate advanced technologies like artificial intelligence (AI) and automation, as well as structured data, to enhance and expand the capabilities of a traditional document management system. Knowledge work automation platforms are advanced document management systems designed to streamline and improve the efficiency of knowledge-intensive tasks. These platforms leverage GenAI, machine learning, and natural language processing to automate repetitive tasks, manage information, and facilitate collaboration among knowledge workers. Overall, KWA platforms represent a significant advancement over traditional DMS by incorporating AI and automation to streamline processes, improve efficiency, and unlock the full value of an organization's knowledge assets.

## KEY BENEFITS OF A KNOWLEDGE WORK AUTOMATION PLATFORM FOR YOUR BUSINESS OPERATIONS

- ✓ **Improved Document Availability and Retrieval:** Quick access to documents from any location enhances productivity by eliminating delays.
- ✓ **Streamlined Workflows:** Automates processes like approvals and archiving, reducing bottlenecks, and accelerating business operations.
- ✓ **Increased Productivity:** Frees knowledge workers to focus on strategic tasks by automating repetitive ones and providing immediate access to information.
- ✓ **Better Decision Making:** Centralized document storage provides accurate, up-to-date information for informed decisions.
- ✓ **Enhanced Security and Compliance:** Protects sensitive information from unauthorized access with features such as encryption, access controls, and audit trails, ensuring documents are secure and compliance requirements are met.
- ✓ **Cost Savings:** Reduces physical storage needs and paper usage while automating tasks to improve efficiency.
- ✓ **Version Control and Collaboration:** Ensures the latest document version is always available, preventing confusion and errors while facilitating collaboration among team members with simultaneous collaboration.
- ✓ **Disaster Recovery:** Backs up documents for easy restoration, minimizing data loss and ensuring business continuity.
- ✓ **Scalability:** Grows with the organization, handling more documents and users as the business expands.

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## ESSENTIAL FEATURES AND CONSIDERATIONS FOR A KNOWLEDGE WORK AUTOMATION PLATFORM

Choosing the right knowledge work automation platform involves understanding the essential features and considerations that will best meet the organization’s needs. There are several key factors to consider when evaluating a KWA platform.

### Artificial Intelligence (AI)

- ✓ Modern knowledge work automation platform solutions leverage artificial intelligence (AI) to streamline document-related processes. AI can automate tasks such as data extraction, classification, and routing, reducing manual effort and increasing efficiency.
- ✓ GenAI tools have transformed productivity, and some knowledge work automation vendors (such as M-Files) now incorporate powerful GenAI technology into their platform, allowing knowledge workers to process vast amounts of information quickly, get answers to complex questions, and arrive at conclusions faster, while still respecting the organization’s security and compliance policies.

### Workflow Automation

- ✓ A KWA platform can significantly enhance workflow automation, leading to a more efficient and streamlined process. Workflow automation ensures that documents move through predefined processes seamlessly, improving productivity and reducing errors. Workflow automation helps save time, reduce errors, promote team member collaboration, and increases document security. By leveraging a KWA platform for workflow automation, organizations can achieve a more efficient, effective, and secure document management processes.

### Metadata Management, Powerful Search Capabilities, and OCR

- ✓ Effective metadata management is crucial for organizing and retrieving documents. A robust KWA platform allows for comprehensive metadata tagging, enabling powerful search capabilities. Optical Character Recognition (OCR) technology further enhances search functionality by converting scanned documents and images into searchable text, making it easier to find information quickly.

### Ensuring Security and Compliance: Data Protection and Regulatory Requirements

- ✓ Security and compliance are paramount when managing sensitive documents. A knowledge work automation platform

offers features such as encryption, access controls, and audit trails to protect data. Additionally, it should help organizations comply with regulatory requirements by providing tools for data retention, e-discovery, and compliance reporting.

### Deciding Between Cloud-Based and On-Premises Solutions

- ✓ Organizations must decide whether a cloud-based or on-premises KWA platform is more suitable for their needs. Cloud-based solutions offer scalability, remote access, and reduced IT overhead, while on-premises solutions provide greater control over data and may be preferred for organizations with stringent security requirements.

### Multilingual and Multi-Device Platform

- ✓ A knowledge work automation platform should support multiple languages and be accessible across multiple devices, such as desktops, tablets, and smartphones. This enhances productivity and flexibility by ensuring that users can access and manage documents regardless of their location or preferred device.

### Integration with Existing Systems

- ✓ Seamless integration with existing systems, such as ERP, CRM, and email platforms, is essential for a KWA platform. These integrations help organize information around enterprise master data and share and access content across different applications, improving workflow efficiency and reducing data silos.

### Secure Collaboration Internally and Externally

- ✓ Choosing the right knowledge work automation platform is critical for enhancing content centric collaboration, even when the business processes go beyond organizational boundaries. By focusing on key features, such as real-time editing, version control, commenting and annotations, workflow automation, and permissions, businesses can improve their document management processes, boost productivity, and maintain the highest levels of security. With external collaboration, it is particularly important to ensure enough control over permissions and automate audit trails.

### User Training and Adoption

- ✓ Effective implementation of a KWA platform requires user training and adoption. Providing training sessions, user guides, and ongoing support ensures that employees are

comfortable with the system and can effectively and efficiently utilize its features. Selecting a system that is intuitive and user-friendly and automates as much of the work as possible provides the best possible user adoption.

Organizations want to select a knowledge work automation platform that not only meets the current needs of the organization but also supports future growth and technological advancement by considering these essential features.

## HOW A KNOWLEDGE WORK AUTOMATION PLATFORM COMPLEMENTS MICROSOFT

For organizations using Microsoft products, a knowledge work automation platform that complements the Microsoft stack can maximize existing investments. With its integration with Microsoft products, M-Files knowledge work automation platform helps organizations optimize investments in Microsoft 365 by providing complementary capabilities for business processes and information governance.

M-Files makes Microsoft 365 the single point of access for all enterprise data, empowering enterprises to find, access, and manage all connected data, regardless of its storage repository, through Microsoft 365 user interfaces.

- ✓ **Microsoft SharePoint:** M-Files SharePoint Connector organizes documents across all SharePoint servers, helping knowledge workers access information faster, work smarter, and drive better outcomes.
- ✓ **Microsoft Outlook:** M-Files Outlook Integration allows users to manage documents directly in Outlook, streamlining email organization. This integration automates filing emails and conversations with the appropriate client and project, enabling knowledge workers to concentrate more on their work.
- ✓ **Microsoft Teams:** M-Files Add-In for Microsoft Teams provides unified access to all enterprise data, enhancing collaboration. This integration empowers knowledge workers to leverage internal and external content collaboration for all enterprise data across any tech-stack.
- ✓ **Microsoft Copilot:** Integration with Copilot for Microsoft 365, helping knowledge workers access relevant data seamlessly, summarize information from recent e-mails, capture meeting transcriptions, create new documents, conduct market research, and analyze regulatory compliance rules.

By combining the well-curated information in M-Files with the insights scattered across Microsoft 365 applications, companies can achieve a comprehensive understanding of their business operations. This integration allows knowledge workers to seamlessly access all enterprise information across systems using natural language.

## CHALLENGES IN HARNESSING ENTERPRISE CONTENT WITH GENAI

Leveraging enterprise content faces several obstacles. Many businesses grapple with information chaos, characterized by data

silos, duplicate data, version control issues, and a lack of data classification. This disorganized information landscape poses a significant challenge to the effective implementation of GenAI solutions. To address these challenges and fully harness the potential of GenAI in enterprise content management, companies must focus on three critical areas:

- 1. Connectivity:** GenAI needs access to all relevant business data for accurate answers, achieved by breaking down data silos and integrating systems. Organizations should invest in data integration strategies and technologies to ensure smooth information flow between departments and systems.
- 2. Confidentiality:** GenAI processes vast amounts of data, so robust security measures are essential. Organizations must implement granular access controls to ensure GenAI systems only access authorized data, based on data classification, user roles, and permissions.
- 3. Curation:** GenAI needs current and relevant information for high-quality outputs. Content curation ensures valuable information is retained and enhances findability and usability for both humans and AI. This creates a cycle of improved data quality and more effective AI outputs.

The journey to effective GenAI implementation may be challenging, but the potential rewards—including enhanced productivity, improved decision-making, and unlocked innovation—make it a worthwhile endeavor for forward-thinking leaders across all industries.

## CONCLUSION

As we navigate the future of work, embracing the digital workplace and knowledge work automation is no longer optional—it's imperative. The right knowledge work automation platform can transform how organizations manage information, streamline workflows, and enhance productivity. By leveraging modern KWA platforms that integrate seamlessly with existing tools like Microsoft 365, businesses can break down information silos, ensure data security, and provide employees with the intuitive, efficient experiences they expect.

Investing in a robust knowledge work automation platform not only optimizes current operations but also positions organizations for future growth and technological advancements. As the digital landscape continues to evolve, those who adapt and innovate will lead the way, driving better business outcomes and maintaining a competitive edge. The future of work is here, and with the right tools, organizations can thrive in this dynamic environment. ■

### About M-Files

M-Files is the leading platform for knowledge work automation. With the M-Files platform, knowledge workers can find information faster, work smarter, and achieve more. M-Files features an innovative meta-driven architecture, embedded workflow engine, and advanced artificial intelligence. This enables customers to eliminate information chaos, improve process efficiency, and automate security and compliance. For more information, visit [www.m-files.com](http://www.m-files.com)