

# Take Advantage Of Document Workflow Efficiencies

by Fiona Branton

Experts provide advice for how automating your paper- and labor-intensive processes can help you save big.

It's likely that your company, like many others, has invested in capture technologies, such as scanners, to convert your paper documents to electronic formats. But if your employees are still handling — printing, copying, filing, routing — scads of paper documents, are you getting the most out of those investments? Are your employees spending time scanning documents in the mailroom or saving email attachments, only to print them out to route to another user? If so, you're not only consuming paper and ink, you're using valuable manpower that could be accomplishing more vital tasks. And that's not to mention the additional risk of input errors and lost documents that occurs every time a paper document is handled.

### AUTOMATE WORKFLOWS FOR EFFICIENCY

Perhaps it's time to consider taking the next step — automating the workflows, or processes, to which these documents belong. “Document workflow can improve efficiency by more than 100%,” notes James True, VP business development, Cabinet NG. “Efficiency, in many cases, marks the difference between companies that succeed and ones that fail. Document management software helps to cut the costs of making copies and associated costs. It all goes back to improving the bottom line, and using document management software can not only help companies preserve their earnings, but grow them as well.”

According to Jay O'Brien, CTO of BP Logix, Inc., “Automating workflows and the business processes they represent helps companies reduce obvious costs, such as paper and printing, but it also makes an even greater impact as these organizations become more streamlined, their operations more efficient, and their employees more productive. That is the promise of automation and it is one that clearly impacts the bottom line.”

Converting paper documents to electronic ones is easier and more affordable than ever, but if you're not also digitizing their related processes and movements throughout your company, you're leaving a lot of potential efficiency gains on the table. When document images are available electronically, multiple people can view, and work on, the same document at the same time. This eliminates the need for duplicate paper copies as well as cover sheets and routing envelopes, as well as the employee resources needed to perform these tasks. Because document images are stored electronically, the need for expensive physical storage space is reduced. “By incorporating a remote document capture component, postage and faxing expenses can also be reduced,” notes Sam Schrage, president of AnyDoc Software. “Instead of mailing or faxing

documents from a regional office to company headquarters, documents can be scanned at a remote location and transmitted via the Internet to a central location [e.g. company headquarters or to a shared services department, such as AP] for processing. By leveraging the classification technology used in the emerging digital mailroom environment, automated document processing now has the ability to be an integrated part of the workflow, not just a front end capture application.”

Initially, the concept of workflow meant basic document routing. “Today, though, the more advanced document and content management applications feature functionality in line with business process management, including capabilities such as business activity monitoring and business intelligence,” says Ken Burns, industry communications manager, Hyland Software. The latest versions of document workflow technology allow companies to create custom document image and data workflows that virtually eliminate the need for manual sorting, routing, and data entry. “On its own, workflow is one of the most effective cost-cutting tools offered as a part of document and content management software applications,” Burns continues. “But when workflow is combined with other components like electronic forms, it can be a powerful paper-reducing tool, too, that can contribute to a company's green initiatives. After the original document is created electronically, workflow takes care of the rest. By handling the automation and execution of the processes, it ensures the document and all other important information stay in electronic format, never having to leave the system as paper.”



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### FOCUS ON PAPER-INTENSIVE PROCESSES

In a typical business, there are many processes that are good candidates for workflow automation. One in particular, because of its notoriety for consuming excess paper, is accounts payable. “With purchase orders inside the business and invoices coming from outside of the business, paper can be tough to control,” notes Burns. “And despite environmental issues taking greater precedence, many organizations — even the ones with technology in place — still print their purchase orders at one point in the process, only to scan the same documents back into a system at a later point. Clearly, this is an unnecessary and wasteful use of paper.”

Adding workflow to a document capture solution can eliminate this wasteful practice. Reports and documents, like purchase orders, are generated automatically by the system and routed electronically to other employees, divisions, branches, or storage repositories as needed. “We have found that there are departments within an enterprise that benefit tremendously from innovative workflow solutions, such as HR, IT, provisioning and purchasing departments, as well as accounting, engineering [development], and marketing,” says O’Brien. “These groups contend daily with large numbers of forms and documents, both from inside and outside their organizations, and have an on-going need to better manage, route, track, and monitor their processes and documents.” True concurs. “The key is to be aware of any process that can be automated with technology,” he explains. “Workflow solutions are best suited for repeated processes that involve documents needing the attention of multiple individuals. This profile is readily found in medical, financial, legal, manufacturing, education, and other verticals.”

And the savings go far beyond reducing expenditures on paper and ink. “By minimizing the number of people that have to touch a document [from a workflow standpoint], these advances in technology enable employees to do more with less, making the complete capture workflow as efficient and accurate as possible,” says Schrage. “Today’s solutions contain the ability to capture critical parts of

workflow and business process management — the data elements within the document that allow the automated solution to make decisions. By incorporating data capture with document routing, invoices with totals greater than \$1,000, for example, can be automatically routed for a second signature required for approval. A PDF will not provide that capability. Instead, this integrated technology, which brings capture workflow into the overall workflow process, gives you that ‘decision-making’ information quickly and accurately with minimal intervention, creating a much more effective solution.”

A number of file types (both document images and data) can be exported to any number of desired locations, such as an ECM (enterprise content management), ERP (enterprise resource planning), or other back end system. Adds O’Brien, “As importantly, these workflow tools provide storage, categorization, and search technologies for all documents, electronic forms [eForms], and the processes themselves. The resulting efficiencies help to reduce the carbon footprint.”

### WORKFLOW BRINGS QUICK RETURNS

It goes without saying that it’s difficult to expend resources on new technologies during periods of economic uncertainty. However, if you are looking for ways to streamline your business processes, reduce costs, and improve productivity in order to stay competitive — or profitable — automating your workflow may well be worth the money. “The ability to accomplish more back office activities with fewer people is critical for companies to stay alive in today’s economy, and as the economy rebounds, companies will also need a way to manage growth,” says Schrage. “A hesitation to invest in technology in these lean times can actually do more harm than good, as labor costs continue to rise and competition may pull ahead. Many companies are now realizing that by investing in technology rather than the recurring costs of escalating labor, they can realize an immediate return and actually boost gross profits, and stay ahead of their competition. In many cases with an effective automated document, data capture, and classification solution, a return on the investment can be achieved in months, not years.” □

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