GUIDE *(Document and Forms Management)*

The Document Management Guide: What You Need to Know to Automate Your Processes and Go Paperless

Organizations today continue to depend on inefficient paper-based and manual processes to manage documents and data. With a never-ending onslaught of data and information, however, keeping track of ever-increasing documents can quickly become overwhelming.

Electronic document management can change all of that—while saving you time and increasing your efficiency. It will help you automate your processes and finally start going paperless in the office.

From invoices to contracts, paper and digital documents enter an organization and have to go somewhere once they do. Unfortunately, for an organization dependent on manual processes, getting documents from Point A to Point B to Point C (and so on) is difficult. Bottlenecks arise and the whole process becomes time-consuming. Once the document is finally stored somewhere, finding it again also takes far longer than it should. Plus, there is tremendous opportunity for error when you manually scan, route, and store a paper document in a physical file cabinet.

> **"Implementing electronic document management is a simple choice for a savvy company."**

Electronic document management systems, on the other hand, make it faster and easier to automate your processes and eliminate paper through each stage of the document management lifecycle:

- **Stage One:** Document Capture and Creation
- **Stage Two:** Document Storage and Management
- **Stage Three:** Document Distribution

Implementing electronic document management is a simple choice for a savvy company. However, document management can quickly become complicated. In order to keep your document management automation process simple and stress-free, you need to have background knowledge on each stage of the document management lifecycle.

Stage One:
Document Capture and Creation

The document management lifecycle begins with document capture and creation. Often, this is the most complicated and time-consuming stage. Every document your organization has—whether paper or digital—needs to be captured into the document management system.

Undoubtedly, your company uses several of the following types of documents:

- Invoices
- Bills of lading
- Proofs of delivery
- Sales proposals
- Contracts
- Expense reports
- Time sheets
- Loan agreements
- Quality control documents
- Human resources documents
- Designs
- Health records
- Patient and consent forms
- Purchase orders
- Maintenance reports
- And more

As a result, when you consider how many documents are actually in your organization, trying to capture every single one of them can seem a daunting task. Especially when you consider the fact that these documents enter the organization in many forms, most notably: paper, electronic, and fax.

Paper Documents
The Problem
You have countless paper documents in an endless sea of filing cabinets. To improve efficiency—and save time, paper, and storage space—you need to capture these documents into your document management system.
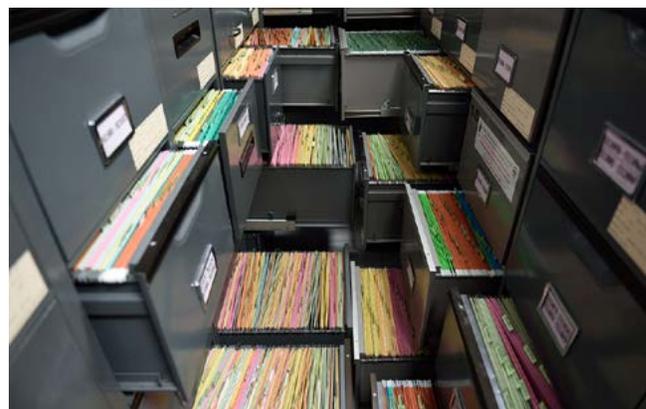
The Solution

Your company may be one of many companies that are already scanning paper documents. Yet, simply scanning lacks standardization and requires the employee who is scanning the document to go through several manual steps to move the document along in the process. Once the document is finally stored, it's often in a manual, messy, and non-secure network folder.

An electronic document management system takes scanning to the next level. Documents are not simply scanned; they are also appropriately indexed with optical character recognition (OCR), barcoding, screen scraping, or direct data entry. As a result, you will be able to easily retrieve them in the future.

Electronic Documents

The Problem

Documents also arrive attached to emails or via file-sharing platforms like Dropbox. Ordinarily, this is a great starting point for document management. But some companies make their electronic documents just as inefficient as their paper ones by printing and storing them in physical filing cabinets, as well.

The Solution

Perhaps your company is already saving emails, email attachments, and other electronic documents. However, this method of saving documents lacks standardization, security, and version control—anyone could change the document, and you wouldn't necessarily know it.

Make it easy. An electronic document management system electronically imports your documents and standardizes the naming structure for you. You can also use the document management system to automatically capture email and attachments from any inbox—and save valuable processing time.

Faxed Documents

The Problem

Documents might also arrive in fax form. When a company

follows manual and paper-based processes, these faxed invoices are likely copied, routed, and ultimately stored in that sea of towering filing cabinets.

The Solution

Your company may scan and save faxed documents already—but again, this process involves manual steps and non-standardized naming conventions.

With an electronic document management system, however, automated document capture is possible for faxed documents. As a result, any inbound or outbound fax transmissions will be automatically captured and saved as PDF or TIFF files in your document management system. Plus, you can use either an Electronic Data Interchange (EDI) solution or data collection tools in your document management system to capture your faxed documents (see Automated Data Capture below).

What About Other Types of Capture?

In addition to your organization's documents, there may be other things you wish to electronically capture—like signatures and data on forms.

Electronic Signature Capture

The Problem

An invoice or another document may need to be signed before it can be captured and filed into the document management system.

For some companies, this means:
- Printing an invoice
- Physically tracking down the person who needs to sign it
- Getting the signature
- Scanning the approved invoice
- Emailing it
- *Finally* saving it into their system

Alternatively, companies might also copy and store the paper invoice in their physical filing cabinets.

The Solution

With a document management system, the invoice can be captured electronically from the get-go. The invoice will be automatically routed to the approver and saved back into the document management system. All of the time that you would have spent trying to track down the signature is restored to your day, ready to be repurposed for more useful activities.

> *"Too often, companies perform manual data entry to transfer key data from forms into their systems."*

Automated Data Capture

The Problem

Too often, companies perform manual data entry to transfer key data from forms into their systems. For instance, a human resources (HR) department has a new employee fill out a W-2 form, and then a host of other documents using the same information. The HR department then has to manually enter the data from the form into their systems. This is time-consuming for both HR and the new employee. Plus, there is a risk that information will be entered incorrectly along the way and need to be corrected later on—potentially wasting more time.

The Solution

While some companies may scan these forms, the simple practice of scanning doesn't capture the actual data.

When you have an electronic document management system, on the other hand, you will be able to use web-based fillable forms to automatically collect and save data into any database, ERP, or document management system. That data can then be used on other forms and documents—without the need to capture it again.

As a result, the automated data capture process is quick, painless, and requires zero data entry.

What About Generating Documents, Like Invoices?

Another area where a document management system can help you go paperless is in document creation.

Document Creation

The Problem

Pre-printed forms are still used by many companies in order to generate invoices and other documents. But with pre-printed forms, you have to undergo manual processes to generate, print, and distribute these documents. This process is incredibly inefficient—and wastes a whole lot of paper.

The Solution

Some companies may already be using software to generate forms. Nevertheless, many types of electronic forms software—like AFP—are outdated and waste just as much time as pre-printed forms.

Document creation is quick and easy with an electronic document management system. You can easily access data across multiple databases and pull the data together to create your ready-to-print forms and documents.

Stage Two: Document Storage and Management

The next stage, document storage and management, is at the center of the document management lifecycle. This is where your documents are secured in one central repository that makes it easy for you to quickly locate your documents exactly when you need them.

Still Storing and Managing Paper Documents?

Many companies are still storing and managing their documents in physical filing cabinets. In order to view a document, there is an extended manual process of physically tracking it down and checking it out. Since the document only exists in paper, there is a greater risk that it may be lost—or filed in the wrong spot.

When a customer or vendor requests a document, such a lengthy process to locate, copy, and send a document stored in paper form is unacceptable. A customer or vendor might wait and wait and wait while an employee struggles to track down the document. Perhaps they even have to play telephone tag as the employee tries to get enough information about the document to track down the right document in the *right* filing cabinet.

On average, it takes 18 minutes to search for a document. This doesn't include the time that it will then take the employee to copy and send it to the customer or vendor—and return the document to its spot in the filing cabinet. Meanwhile, an electronic document management system significantly shortens the time it takes to track down a document and send a copy of it to the customer or vendor. All it takes is a quick search, a couple of clicks, and **less than 5 minutes** to deliver the document directly to the customer or vendor—by email, fax, FTP, or other options.

Additionally, companies with electronic document management systems also free up valuable real estate. The space that was once used to store all of those filing cabinets is available to be allocated for other purposes.

Plus, with an electronic document management system, you can find, use, share, and access your documents at any time and from anywhere. You'll no longer need to be in the office in order to retrieve a document or locate a document to pass on to a customer or vendor.

What's the Difference: Scanning and Saving Documents Electronically vs. Electronic Document Management?

Some companies may believe that they already have an "electronic document management system." Perhaps they've scanned and stored documents electronically, but their system isn't an actual system: it lacks indexing, standardization, and security.

While documents may be saved in such an informal document management "system," can these documents actually be retrieved when needed?

Without a standardized process, pseudo-document management is truly like the Wild West. Anyone can do anything they want. An invoice from Employee A could be named one way while the very same invoice from Employee B could be named another—and Employee A can't find Employee B's invoice and vice versa.

Automatic indexing by actual electronic document management systems makes it easy to find documents—whether it's later that same day or many years later—no matter who captured or received the document in the first place.

Security is also a very real concern when a company lacks an electronic document management system. For instance, HR documents that detail confidential employee information like salary would not be secure without a proper document management system. Someone could accidentally view or override the confidential information, and that accident would stir up a series of unpleasant events for the company.

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An *actual* electronic document management system secures documents so that only those who have the authority to view the document can view it. Version control prevents anyone from making unwanted changes to the document, and a formal check-in/check-out process ensures visibility over everyone who has made changes to the document, as well as what changes have been made.

The security of an electronic document management system also protects your documents from cybercrime, data leak-

age, and threats. No matter what, with the right document management system, your company will rest assured that essential business documents are safe.

Stage Three: Document Distribution

The final phase of the document management lifecycle is document distribution. Document distribution may take place internally or externally. It may include approval and routing processes, document assembly, and document delivery.

Approval and Routing Processes

Companies dependent on paper documents and physical filing cabinets for storage follow manual approval and delivery processes for their documents. When a document, like an invoice or purchase order, needs to be approved, these companies route it manually from person-to-person, often leaving the document on someone's desk in the hope that he or she will approve it and pass it along to the next person. This is how documents get lost and force an approval process to start over from the beginning.

With an electronic document management system, companies can automate all of their paper-intensive processes. In the case of a document approval process, the document management system automatically routes the document from person-to-person electronically. Since the document in question can be accessed from anywhere, you won't need

to worry about trying to track down someone who's out of the office or away from his or her desk. Moreover, since the document and process are both electronic, the document can never be lost. Instead of micro-managing your approval process, let the electronic document management system take care of it for you.

In the meantime, you can spend your now-free time catching up on your other important tasks.

Document Assembly

Companies across various industries—for instance, insurance or manufacturing—need to assemble documents or packets for their customers and vendors. When these companies follow a paper-based process, assembling documents consumes employee time and wastes even more paper.

With an electronic document management system, on the other hand, you can use a document creation tool to combine electronic files from different sources into a single document for printing, electronic storage, and distribution via email, automated workflow, or fax.

Document Delivery

Documents—whether singular or assembled packets—and reports need to be delivered to your customers and vendors. With paper-based and manual processes, document delivery means any combination of:

- Printing
- Copying
- Scanning
- Faxing
- Mailing
- Emailing

Completed manually, document delivery wastes time, paper, and often postage.

But with an electronic document management system, the documents and reports are already saved in the system. Delivery is just a click away, and the documents or reports can be automatically emailed, faxed, or distributed to any

output directory, output queue, FTP site, or document management system.

Your electronic document management system just created some serious savings for your company on paper, printing, postage, and employee time.

Getting Started

There are endless ways to start going paperless and automating your processes with an electronic document management system.

Perhaps your company wants to start by capturing all of existing documents—or by capturing documents from Date X and forward.

Or maybe your company is already satisfied with how documents are captured and now you want to implement a system that will automatically index and organize digital documents.

It's possible that your company already has that covered, too. But perhaps there is a need for help automating the document distribution process.

Whatever the case may be, your company has options.

HelpSystems recommends starting by implementing document management in one department of your company. Common departments to begin with include:

- Accounts Payable
- Accounts Receivable
- Human Resources

From there, once the document management system is established and you begin experiencing the benefits, you can easily bring it into other departments of your company with full knowledge and reasonable expectations.

HelpSystems Document Management has an array of solutions that can meet your individual need—no matter what industry your company is in. Plus, HelpSystems can help you assess your current document management strategy and determine the areas where you should start going paperless and automating your processes.

Ready to get started?

Request your free demo today.

www.helpsystems.com