General Data Protection Rule (GDPR)

Whitepaper

Document Automation is the new Document Management

eBook

By *Tom Pintens*

There are hundreds of digital document management applications to choose from. Software applications that allow you to retrieve and index your documents using the correct metadata, such as client information or project codes. Some suppliers go a step further and provide the option to create workflows or to digitise particular processes. That's a massive leap compared to the days of hardcopy archiving, or the typical Windows Explorer, with its folders and subfolders.

Where many document management applications lag behind by continuing to classify documents using folders, many organisations have quickly realised that correct indexing of information and documents is structurally far more valuable than

the hierarchical, and rather limited, Windows Explorer.

Why improve the already perfect? The first search engines (Gopher, Altavista, Infoseek, Yahoo…) were wiped from the web at the end of the 90s by the only search engine that matters.
The typical hierarchical search method, copied from the file server's tree structure, was frustrating rather than user-friendly.

But considerable manual work is still required in index-based document management solutions. Some organisations already use software that automatically recognises pdf or paper invoices and forwards it as a booking proposal to the accountancy or ERP programme. Yet few realise this can be scaled out across the rest of the organisation, where more often than not the document volumes are even bigger.

What is Document Automation?

Document automation entails the removal of as many manual tasks as possible. We want to automate tasks such as document recognition, classification and allocation of them to the right process, by outsourcing the tasks to a virtual "office manager". Every day businesses receive hundreds of documents to process. Many documents are manually interpreted and forwarded or classified. Others must then be linked to applications or information has to be updated. Document automation is the process via which these tasks are intelligently entrusted to the digital "office manager".

Document Automation in every department.

All departments have tasks that can be partially or fully automated. In the HR department it's possible to correctly recognise and index repetitive documents (employment contracts, appraisals, email correspondence, insurance related information, etc.) via an automated process, and in bulk. But this can go a step farther, by also correctly safeguarding this privacy sensitive information in line with GDPR legislation. It's not merely HR documents that can be automatically allocated to the right category or process: applications, work orders or delivery notes, shipping notes, contracts etc. are all possible too. With any document type there are a number of tasks that can be automated, in turn saving the employees valuable time.

Thanks to automation, we saved 100 million fields to be completed in 4 years.

Document Automation saves time. A lot of time.

A client involved in insurances had to provide each new claim with extra information and in-house codes in order to categorise it correctly. A work-intensive process that necessitated searching various systems time and again. Together with this client we assessed the process and created a procedure where the employees only had to complete one entry field as opposed to 10. The automation lay in the fact that the software made these searches. This equated to a saving of 9 searchable fields per document.

In doing so, over 4 years' time we saved on 100,000,000 fields to be completed. If you calculate that 1 search on average took 10 seconds to complete, that equates to a saving of 30 years (or 34,000 working days).

With another elevator installation and servicing client, we ensured all reports and interventions could be simply archived. The liability this type of organisation bears, is significant should anything go wrong with a poorly maintained lift. Correct data retention is therefore vital. With this automation they could continue to grow (25% annual growth) at no extra administrative cost to the organisation.
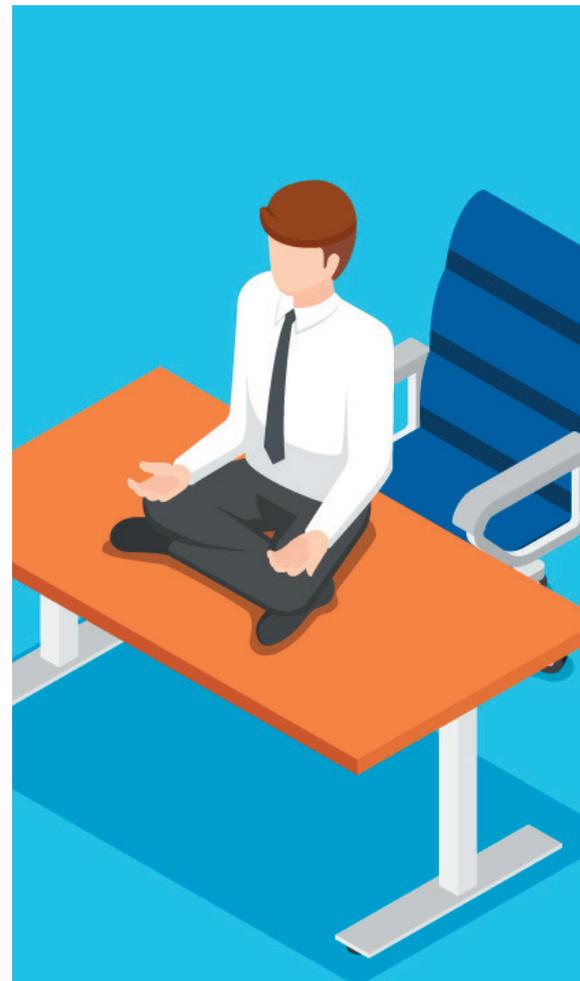
A search engine for your own information.

The creation of a central archive will also result in

additional added value for the users, especially when they are searching for information. An intelligent algorithm searches the entire database looking for non-searchable documents. Via an automated process we ensure that all documents can also be searched on content too, even if these are old scans. Email attachments, smartphone photos... all are analysed and made searchable. Thanks to an advanced search engine you can search through hundreds of thousands of documents on content, and visualise the results at lightning speed.

Automatically linking documents with your ERP or CRM

Each business application creates documents or requires input from documents. These links can also be automated: notifying your ERP that a quotation has been signed and returned, automatically entering an invoice, or linking an email to the correct client. Many of these processes can be quickly and easily automated, saving time day in, day out. Time you can better use to increase your customer base.

First the org chart, then the document types, and finally the workflow templates.

How to get started?

The first step seems the hardest, but it isn't. The best way to start is by mapping the different departments in your organisation, such as: HR, Sales, Finance, Warehouse, Project Management, Contracting... Documents are created and received in each of these departments. The second step is to list these document types. And this is best done by department. With your help, our initial report outlines what must happen with these documents, whether they require a workflow, their retention period, and who has access to them. Again, together,

we formulate the first templates to facilitate this. In some cases a department can be set up like this within just 2 days, and your time-saving takes effect immediately.

What is a typical Return on Investment?

Smartdoc has already been implemented at 300 organisations. At times with just 4 users; at others with hundreds of users. In each instance we run through the business at hand step-by-step, and phase in implementation. This helps minimise in-house costs for each organisation, as well as the risks. Post-implementation, on average an hour is easily saved per user per day.

Discover how Document Automation can also help your company.

Do you have questions or would you like to know more about Smartdoc? Contact us without obligation. Our employees are happy to help you: **sales@smartdoc.eu**

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