



Capture. Collaborate. SharePoint.

Today most organizations are driven by the need to significantly cut costs, an increased sensitivity to compliance and corporate governance, a heightened demand to provide the highest quality customer service and a need to facilitate information sharing and collaboration.

Central to meeting these business objectives is effective information or content management. A familiar term for this is Enterprise Content Management (ECM).

ECM strategies and technology ensure organizations have rapid and simultaneous access to mission critical content resulting in accelerated business processes, improved team productivity and better decision making.

In recent years Microsoft Sharepoint Server (MSS) has changed the ECM landscape by providing a content management platform for the masses. MSS is an integrated suite of server capabilities that can improve organizational effectiveness by providing content management services.

An end-to-end content management solution, however, must manage all content including paper which continues to play an important role in business.

This white paper will explore how SharePoint, when complemented with the right front-end capture components, can provide a comprehensive content management solution that helps organizations run, grow and transform their businesses.

Overview

Microsoft SharePoint originated in 2000 as a portal and collaborative environment. It provided organizations with the ability to store documents and enabled collaboration within the enterprise. Since its launch, SharePoint has experienced phenomenal growth as organizations benefited from this platform that enabled cross-departmental and cross-organizational collaboration and content exchange. This high performance collaborative environment enables organizations of all sizes to increase the efficiency of their business processes and improve team productivity.

With the evolution of SharePoint, Microsoft took organizational collaboration to a new level. In 2007, Microsoft extended the capabilities of SharePoint to include content management. They added support for document, web and records management. The result was a single platform for collaboration, communication and content management. SharePoint moved beyond the portal and became Enterprise Content Management (ECM).

In 2008, Gartner placed SharePoint in the Leaders' Magic Quadrant for Enterprise Content Management.

AIIM, the ECM Industry Association, defines Enterprise Content Management as "the strategies, methods and tools used to capture, manage, store, preserve and deliver content and documents related to key organization processes."

Today, organizations consider ECM both a technology and a strategy to deal with all types of content including electronic, web and paper-based. Paper remains pervasive as many business processes are still dependent on it. A recent survey by CAP Venture revealed that 80% of information is still retained on paper even though more than 80% of the documents we work with are already in a computer somewhere.

Given the sheer volume of content that still resides on paper, document capture also known as document imaging, must play a critical role in an organization's ECM strategy.

An investment in capture is strategic to leveraging the investment in SharePoint. By pairing capture and collaboration, organizations have access to all content enabling them to maximize their use of corporate data and allowing them to execute more accurately, more consistently and more productively.

Let's explore more closely how integrating capture and collaboration provides a broader information infrastructure.

Capture

Most organizations remain buried in paper. They rely on paper for historical reference, discovery, proof of business activities and legal compliance, knowledge sharing and decision making. Many mission-critical business processes are initiated by a piece of paper – a job application, purchase order and invoice are just a few examples.

There are inherent problems with paper-based records. They are costly to store and manage, difficult to find, prone to errors and duplicity and are often lost or misplaced.

Here are some informative statistics regarding the costs of paper-based records:

- The average document is copied 9 times (Gartner)
- The number of pieces of paper consumed in the U.S. is going up at a rate of 20% per year (IDC)
- The cost to fill a four drawer filing cabinet is \$25,000 and it costs \$2,000 per year to maintain (futurelawoffice.com)
- Inc. Magazine reported these costs for mishandling paper:
 - o \$20 to file a document
 - o \$120 to search for a misfiled document
 - o \$250 to recreate a lost document

Capture hardware and software transforms content from paper into business-ready content. Organizations can scan to image or scan to process to support document centric business processes. Both deliver strong business value resulting in significant cost savings and greater business process efficiency.

Collaborate

The Information Worker must be the central focus of any content management strategy. The Information Worker is anyone who handles highly valued content. In addition to paper, the Information Worker must handle other content like electronic mail and a wide variety of electronic files.

The Information Workers needs:

- Shared access
- Fast access
- Secured access
- Single point of access to all content

Collaboration software allows organizations to manage content in a single repository while using secure workspaces to execute organizational projects and business processes. Collaboration is people working together and sharing information is key. Portals are a great facilitator of collaboration because they

provide the forums and tools for Information Workers to collect and share information. Having a central place to access content enables employees to work together to create corporate data.

SharePoint provides the tools needed to create a high-impact collaborative environment enabling the organization to optimize efficiency and increase returns.

SharePoint

Many organizations have identified both capture and collaboration as critical components to meet their strategic content management business needs.

SharePoint is an established platform capable of delivering high-impact collaboration. In the past decade, Microsoft has extended the SharePoint platform to include a wide-range of content management capabilities such as version control, information rights management, workflow and management services including library, policy and metadata.

In addition to the content management, portal and collaboration services, SharePoint provides search to find information, business forms for basic data collection and business intelligence to analyze and present information to support better decision making. These are critical complementary technologies for content management.

Because of the broad adoption of SharePoint for collaboration and the breadth of the capabilities it offers, SharePoint is emerging as the ECM platform of choice for many organizations.

SharePoint is not, however, an all inclusive ECM solution. Microsoft relies on their partner ecosystem to fill gaps in functionality and to expand the use of the SharePoint environment. An essential technology component that Microsoft relies on is the expertise of their partners to fill is capture. This includes both hardware and software.

For many business applications, capture is the critical first step. It is often referred to as the on-ramp to ECM.

Capture completes the information sharing or collaborative environment by including paper content resulting in a single system to manage all content. Capture can automate document driven processes by transforming the paper into process-ready information that can be delivered to the appropriate line of business application, expediting the business processes and resulting in significant cost savings.

Fujitsu is an established leader in the capture market providing state-of-the-art scanning hardware that delivers speed, image quality and unsurpassed paper handling.

Fujitsu's innovative scanning solutions make it easy for Information Workers with little to no training to create high quality images. Additionally, Fujitsu document imaging scanners are shipped with software called Connect that allows users to scan directly into Microsoft SharePoint by utilizing an interface that mirrors it, simplifying how workers can capture, store, manage and access documents.

Business Environment

Organizations of all sizes and sectors can benefit from a capture-enabled SharePoint environment. The following is a list of known industries that are using these combined technologies to solve real-world business problems:

- Banking
- Construction
- Education
- Financial services
- Government
- Healthcare
- Managed services (Administrative and Information Technology)
- Manufacturing
- Real Estate
- Retail

The result of combining capture and SharePoint is a highly functional platform that addresses a wide range of applications including:

- Scan to Image:
 - o *Historical documents*
 - o *Patient records*
 - o *Signature cards*
 - o *Customer records*
 - o *Student records*
 - o *Technical documentation*
 - o *Employee records*
 - o *Escrow files*
- Scan to Process:
 - o *Accounts payable*
 - o *Claims processing*
 - o *Contracts*
 - o *Loan applications*
 - o *Order processing*
 - o *Purchase orders*

Business Benefits

Investments in information technology today need to yield substantial and verifiable return on the investment. Companies that have implemented capture and SharePoint have reported the following benefits:

- Significant cost savings
 - o Reduced filing time
 - o Reduced physical storage requirements
 - o Eliminate lost or misplaced documents
 - o Faster discovery
 - o Reduced errors
- Optimized business processes
 - o Lower costs
 - o Faster time to market
- o Increased productivity
- o Capacity improvements
- o Enhanced visibility to status
- Increased security and access control
- Reduced reliance on traditional document communication methods (FAX, Postal, Courier)
- Enhanced compliance
 - o Traceable audit trail
 - o Better document governance
 - o Increased accountability
- Enhanced customer service
- Disaster protection
- Seamless collaboration
- Improved internal and external communication

Case Study As Reported by KnowledgeLake, Inc. Railway Contracting Services Gains Greater Visibility Into Invoices While Improving Payment Cycles

Business Needs

VolkerRail experienced challenges in the areas of invoice storage, retrieval and approval. Unnecessary time was spent to travel to a central location as well as manually finding and filing invoices. At the same time the manual nature of filling and finding invoices led to lost invoices. Since invoices were not immediately and easily available and visits to the invoice storage facility were done on an ad hoc basis, invoices could age and project cost reconciliations could become out of date, compromising financial control on accruals as well as project budgeting processes.

Solution

Dynamyx, VolkerRail's chosen software solution provider, helped the company evaluate several document imaging solutions, including a native adapter for the incumbent financial system. After a careful evaluation, Dynamyx suggested that VolkerRail proceed with a combination of Fujitsu workgroup scanners, KnowledgeLake Imaging and Microsoft SharePoint. The priority project was to deliver a solution to scan and host purchase ledger invoices online for a geographically dispersed audience. Following successful roll-out of a group-wide purchase ledger imaging solution, other processes within the accounting and human resources departments are planned to be automated as well. Matthew Booth, Business Analyst, VolkerRail commented,

“We selected Microsoft SharePoint as the base platform for our solution because of its ease of use and compatibility with other applications within the Microsoft Office suite. VolkerRails internal Intranet uses Microsoft SharePoint and we wanted a consistent look and feel for our scanning solution.”

The solution allows the purchase ledger team to code invoices in the accounting system and then scan and index them into SharePoint. Users work in teams of two, with each team sharing a small footprint Fujitsu workgroup scanner (fi-6140). The speed and ease-of-use of the scanner allow users to process up to 300 invoices per day using KnowledgeLake Capture. Scanning rules in KnowledgeLake include bar code recognition, page separation, blank page detection and various imaging enhancements. During indexing, KnowledgeLake allow users to see the image and relevant properties side by side and require that only the coded reference number of the invoice be entered. Other properties are loaded and validated automatically from the backend accounting system. On average it takes users 25 seconds to process an invoice from paper to SharePoint.

“The implementation of the scanning system in our department has been quick and easy. We found staff required minimal

amounts of training before being confident on using the software. Scanning has reduced the amount of time staff had previously spent copying filed invoices for commercial staff and the new system means any member of our staff can have access to electronic copies of documents anywhere in the country. More recently, the AP team has stopped filing invoices away. We are now solely storing our invoices electronically and this again has saved the department valuable time. The scanning system has proved a valuable tool which has saved our busy department valuable man hours; I would recommend this software to any AP department without a scanning solution,” says Michelle Walters, Purchase Ledger Supervisor, VolkerRail

By selecting Fujitsu scanners and using KnowledgeLake Document Imaging for SharePoint, VolkerRail ensured that a generic and scalable platform for document imaging is available to the whole group while at the same time leveraging their current investments in Microsoft technologies.

Benefits

Enhanced Document Visibility

It was not previously possible for stakeholders to access invoices from remote locations. Users of the solution can now simply log into SharePoint to confirm that an invoice has arrived, check the invoice status and update the invoice properties without leaving their desk.

Reduced Paper Storage Requirements

Because invoices are scanned into SharePoint the paper copies can now be moved to more cost effective storage as they are no longer required as part of the invoice approval lifecycle.

Instant Document Retrieval

Invoices can be found instantly by running a search on invoice properties or sorted using the SharePoint views functionality. Time is saved in comparison to manual searching.

Filing Time Reduced

Automated filing can be done faster than manual filing with the use of drop down selection boxes, automatically populating fields from the accounting system and indexing invoices directly into the system.

Improved Security

Only staff with the appropriate access levels in SharePoint are able to view and change the properties of invoices.

Better Document Governance

By scanning invoices straight into SharePoint on arrival, the risk of misplacing invoices are reduced. It is also possible to immediately check invoice status rather than invoking a manual search process.

Opportunities for Re-use and Extension

The solution is not limited to a specific functional area in VolkerRail and can be used as a basis for future solutions across the group.

“Our commercial teams faced continual problems supporting claims made to our main customers. These claims needed to be backed up with hard copies of all expenditure included in the claim, leading to site based commercial teams spending time in our head office photocopying invoices. This was both an unwanted overhead expense on our contracts but also led to senior members of our commercial teams not adding value to the contracts they were working on. The business now has greater visibility to invoices in query which should lead to an improved payment cycle ensuring our suppliers are paid in a timelier manner. The obvious benefit of the implementation of the scanning solution is it has led to other areas of the business showing an interest in improved document management. VolkerRail is now scanning all cash book payments and are planning to scan staff timesheets, sub contract invoices, employee records and transmittal forms.” Matthew Booth

– Business Analyst, VolkerRail

The solution that Dynamyx proposed was cost effective and allowed VolkerRail to leverage investments already made with existing Microsoft productivity applications. Furthermore, the Dynamyx solution was considered to be easy to use and maintain – underpinned by Fujitsu Workgroup Scanners that required very little training.