Goodbye Paper
HelloFreedom

IntelliChief™ White Paper Series

Paperless Process Management

i IntelliChief
Paperless Process Management

Executive Overview

Usually, the only reason why we're still using paper to do business is because we always have.

- There's no cost benefit.
- It's not efficient.
- It's not secure.
- It's not reliable.

And there's certainly no 'nostalgic' value attached to stacks of paperwork and rows of filing cabinets.

We use paper because it's familiar, and because the thought of changing to something else causes trepidation. Fear of change costs businesses worldwide billions of dollars per year. Just take a look at a few of these statistics from The Gartner Group:

- Knowledge workers spend more than 20% of their time on document management tasks.
- The average document is copied, either physically or electronically, nine to 11 times at a cost of about $18.
- Documents cost about $20 each to file.
- Retrieving a misfiled document costs about $120.
- Regulations such as SOX and HIPAA require increasingly complex and time-consuming document controls.

And paper-based companies willingly incur these costs while the business world becomes more complex, competitive, and cost conscious at an exponential rate.

Enough already. Considering that the use of paper in business began in Ancient Egypt, it's time for a change. Something that allows you to eliminate paper in the workplace affordably and without cobbling together different technologies and products. Something that the end users will accept in a heartbeat because it makes their lives easier. Something that is reliable, stable, and secure.

That change is Paperless Process Management (PPM) - an advancement of enterprise content management (ECM), focusing directly on business process, providing you visibility and integrating directly with your enterprise resource planning (ERP) or line of business system. PPM takes the goals sitting behind many disparate document management technologies and combines them into a single, seamless document, process, and lifecycle concept that lets you conduct business without paper.

PPM removes the limitations of paper as well as the attached costs and time-consuming tasks. What you get with PPM is a centrally managed repository for handling and managing documents electronically. This allows you to create, deliver, receive, control and archive all of your documents and business content from a PC or mobile device.

At the same time, PPM allows you to retain the core of your IT system so you don't have to replace all of your PCs, make a massive server switchover, or hire a team of expensive programmers versed in some obscure new technology platform.

Fact: you probably already have 90% of the technology you need to implement a total PPM system. It's just a matter of someone showing you how to tie it all together.

What is PPM?

PPM Unites Multiple Technologies with Your Data

Until now, the business of managing the flow of documents as they snake through your organization has been fractured into niche areas consisting of different philosophies, strengths, weaknesses, vendors and adherents. The products coming out of these niche areas tend to be extremely granular. They focus on performing a specific range of tasks very well while not addressing other tasks sitting outside their niche.

Consider the following niche technology areas:

- Electronic Document Management (EDM)
- Business Process Management (BPM)
- Electronic Records Management (ERM)
- Electronic Document Distribution (EDD)
- Information Life Cycle Management (ILM)

PPM, on the other hand, unites these document, content and business process management niche technologies into one solution that electronically and centrally manages the creation, management, storage and processing of all business content. Within PPM, documents are created or 'born' into the system in one of two ways: internal creation or external creation.

In the internal creation scenario, a document is created from a business application such as ERP or CRM. The document is born through an automated process, or as a result of an end user initiating the activity within the business application. How it works its way through the organization is what PPM manages along with its delivery (email, Web posting, fax, or to a printer if a paper copy is needed), ultimately to internal or external locations.

Meanwhile, externally created documents enter your PPM system by one of two routes. Either the document is already digital (an incoming fax or email attachment) and can be routed to the intended recipient with no manual intervention, or it's a paper document and will need to be scanned and indexed.

However the document is created, once it is in the system, it automatically enters the document archive and workflow cycle intended. This means it can be prioritized, routed, retrieved, edited, processed, protected, reviewed and a lot more based on a highly flexible, centrally managed workflow map. You can even assign very specific deadlines for each stage of a document's progress and notifications.

During this workflow process, the document actually lives in secure document archive. The archive not only serves as a storage point, but it is also where you manage and customize your document retention policies and user authorizations.

Within workflow and archiving, everything that happens to a document from creation to disposal, is actionable, trackable, and utterly secure. And all of this occurs while the user sits at their PC. They don't have to get up to stand at printers, fax machines, photocopiers, or to track down lost paper documents.

Ultimately, PPM takes your business content and documents from cradle to grave without ever rendering it as a paper document unless absolutely necessary. The benefits are better security, the flexibility to have multiple users working on documents at the same time, eliminating lost or misplaced paper, no degradation of original document, and the ability to enact rules that ensure adherence to company policies.

What Drives Companies to PPM

What drives any company towards a new technology solution? Excessive costs and rampant inefficiency.

Quite simply, the demand for PPM has been around for years. The problem has been making PPM available in such a way that it's both reliable and affordable.

Also, there has been the issue of compatibility and being able to utilize a set of homogeneous tools, file formats and information transfer methods so that everyone is on the same page.

The cost and availability of bandwidth and memory is no longer an issue. Technologies have leveled the playing field to allow everyone to communicate quickly and securely regardless of their platform, operating system or core business applications. And, if an interface conflict occurs, the fix is a manageable project.

The forces driving companies to PPM are cost and inefficiency in highly competitive markets, but it's existing modern technology that allows PPM to easily fit into any company's IT structure and corporate culture.

Where Does PPM Fit

PPM fuses all the strengths and benefits from workflow management, content management, document management and electronic document distribution and submerges itself, as much as possible, behind familiar business application and email clients. This means that your users don't need extensive training when working in a PPM-driven business environment.

PPM builds upon your existing technological infrastructure and current processes to improve the way you do business.

Some functions, like workflow processing and scanning paper documents, may require a separate thin or thick client. In these instances, the user interface needs to be feature-rich while also being intuitive and logical.

Compare this strategy to purchasing multiple workflow, content management and document distribution packages, each of which may require separate new technology training for your end users while overlapping each other's functionality unnecessarily.

Using PPM's integration into your current processes and applications, you can wrap the cost and efficiency benefits around numerous operational sectors without purchasing separate, process-specific tools. PPM can be integrated into the following operational sectors among many others:

- Accounting
- Finance
- Operations
- Distribution
- Sales
- Customer Service
- Legal
- Human Resources

By streamlining workflow and eliminating paper-based processes across these departments, PPM increases performance in terms of:

- • Competitive advantage
- • Customer service
- • Quality management
- • Regulatory compliance

Business Requirements
- Competitive Advantage
- Customer Service
- Quality Management
- Regulatory Compliance

Business Applications
- Accounting & Finance
- Operations & Distribution
- Sales & Marketing
- Human Resources

Paperless Process Management
- Create
- Capture
- Archive
- Distribute
- Retrieve

Business Process Management / Workflow

Content Management / Records Management

Digital Information Processing / Electronic Document Distribution

Security

Fiscal benefit: PPM cuts costs dramatically across all of these operational sectors because you no longer rely on inefficient paper-based processes, equipment and supplies.

PPM Architecture

PPM's architecture isn't complex, and that's intentional.

PPM's flexible, simple architecture allows it to grow, adapt and respond to your company's requirements as quickly as you need to respond to market demands.

In essence, PPM can be divided into six distinct architectural components. While each area performs distinct functions and provides specific benefits, all components are centrally managed and constantly synchronized.

Capture

'Capture' represents the conversion of paper documents into electronic documents.

Though you've gone paperless, that doesn't mean your customers and vendors have done the same. You will continue to receive mission-critical documents in paper form, and a PPM solution must be able to quickly scan the document, convert it to electronic format and archive it for later retrieval and review.

That said, not all documents are manually scanned. A true PPM solution should also automatically capture and index inbound and outbound documents delivered by fax and as email attachments. Documents delivered in this manner are already in electronic format and should require little or no manual intervention.

Create

'Create' is the production of electronic documents from within your organization's computer systems.

The create component of your PPM solution allows you to work within familiar business application screens to generate documents for electronic delivery.

In addition, PPM allows your data to be applied to customized design and formatting templates. This allows you to create polished, professional forms without outsourcing any work to an expensive print shop. You incorporate design features including logos, signatures, barcodes, font treatments, precise data positioning, shading, lines and a lot more internally.

Data reformatting functionality also allows you to eliminate redundant information, eliminate multi-line detail items and perform other functions to reduce document page counts. You create shorter, easy-handling forms while enhancing readability.

Distribute

'Distribute' refers to the delivery of newly created electronic documents to fax machines, email boxes, Websites, or to printers.

You've noticed it: customers and vendors are growing increasingly demanding when it comes to how documents get delivered to them. In addition to wanting them in multiple formats, they may also want copies CCed to multiple individuals. Using centrally managed recipient profiles, PPM allows you to customize delivery formats and routing options without the end user becoming involved in who gets PDF, who gets fax, who wants to view their forms online, and who gets a print copy.

Very often, you'll be able to simply schedule when documents should be created and delivered. PPM will automatically perform those delivery functions as you'd like them scheduled, without any end user involvement.

In instances where document delivery requires user activity, all they have to do is click "Send" or "Print" and move on to their next task. PPM distributes documents exactly how the recipient wants them, automatically.

Retrieve

'Retrieve' lets authorized users find, access and review electronic documents in the PPM archive.

Retrieval usually occurs using a thin client or from a Web portal. It replaces the time and space consuming practice of maintaining filing cabinets full of paper documents. The 'Retrieve' component of PPM allows you to reclaim that physical space while exponentially cutting down on time spent locating documents. It also noticeably reduces resource time and cost spend locating lost documents.

Retrieve through PPM is much more secure and less costly compared to maintaining sets of room and cabinet keys, lock combinations and other physical security measures.

Workflow

'Workflow' controls the movement and processing of electronic documents throughout your system.

Usually accessed via a thin client, the Workflow component of a PPM solution operates as a traffic cop for your documents, content and processes.

Using a thin client hub, the user can view and process documents, alerts and notification, as well as set deadlines for certain actions and responses.

Users and managers can also track processes and produce an audit trail to stay constantly on top on transactional and time sensitive documents.

While much of PPM's workflow functionality is appealing from the productivity / efficiency perspective, it's equally critical to view workflow through the lens of a regulatory environments. Highly dynamic workflow features aren't a luxury so much as a necessity when you need to produce very specific tracking and auditing information for compliance reasons.

Archive

'Archive' is the central repository – or safe – where the electronic documents are stored.

This is the component that replaces the rows of filing cabinets and other physical storage you currently use on- and off-site. It is also where your PPM solution performs the bulk of its document lifecycle management procedures.

Archiving is the most important functional area within PPM, because all the others funnel in to or out of this one. The Archive component is also where your document retention policies are created and stored. For any business regulatory environment, retention policies are both critical, time consuming and costly.

But through PPM, you can quickly and efficiently customize how long specific documents (or groups of documents) should be retained and then destroyed. The archive also makes it possible for authorized users to locate documents, no matter how old, with tremendous ease.

As we've noted in other sections of this white paper, this level of document lifecycle management is critical, both to efficiency as well as ensuring that you comply with various industry-specific or industry-wide regulations.

Let's take a quick look at some different departments to see how PPM can provide specific benefits to that functional area.

Accounts Payable

Department Processes / Documents

- Taking advantage of vendor discount offers
- Three-way matching of purchase orders, PODs and invoices
- Call-backs to vendors when researching issues
- Compliance with Sarbanes Oxley
- Printing and delivering MICR checks
- Create multiple copies of multiple documents for various levels of filing and delivery

Benefits Provided by PPM

- Single area for all AP documents
- Automate three-way matching
- Utilize automatic reminders to take advantage of vendor offers
- Store all electronic documents in single repository for easy access
- Eliminate "call backs" via immediate access to all electronic documents
- Ease audit and research with easy access to all related documents with a few key strokes
- Create an electronic document once and make it centrally available to authorized users
- Cost-effective, secure check printing to remote or local MICR printers.

Customer Service

Department Processes / Documents

- Claims History
- User Manuals
- Customer Invoice / Order History
- Regulatory Documents
- Safety Documents / MSDS Sheets
- Manufacturing Documents
- Customer Correspondence
- Warranty Registration Documents
- Repair and RMA Documents
- Telephone Recordings
- Proof of Delivery / Tracking

Benefits Provided by PPM

- Single area for all customer based documents
- All authorized users have access to electronic documents simultaneously
- Store all electronic documents in single repository for easy access
- Eliminate "call backs" via immediate access to all electronic documents
- Ease audit and research with access to all related documents with a few key strokes
- Secure Web access for customers to key documents
- Electronic storage of user documentation for easy distribution by fax, email, print and Web

Human Resources

Department Processes / Documents

- Resumes and Employment Applications
- Employee Information Card, Time Sheets
- Separation and Confidentiality Agreements
- W-4 and Other Tax Forms
- I-9 Homeland Security Verification
- 1099 and W-2 Wage Statements
- Workmen's Compensation
- Employee Handbooks
- 401(k) and Other Financial Forms
- Electronic Information such as videos, photos and voice mails
- Direct Deposit Forms
- Life, Health and Dental Insurance Forms
- Personnel Action and Performance Improvement Forms

Benefits Provided by PPM

- Provide secure electronic file of all HR related documents
- Provide electronic access to authorized personnel to specific documents
- Use electronic workflow process for review hiring process
- Provide access by authorized personnel to documents via portal
- Eliminate need for copies of documents in personal files, freeing valuable office space
- Store images, PC-created documents and inbound faxes, and all other electronic media in single repository

Sales/Order Processing

Department Processes / Documents

- Sales Order Forms
- Approval Forms
- Change Orders
- Credit Memos
- Price Lists
- Credit Applications / Verifications / Reports
- Contracts or Legal Agreements
- Addendums / Exceptions
- Quotes / RFI / RFP / RFQ
- Customer Purchase Orders
- Proof of Delivery
- Commission Statements
- Sales / Margin / Profitability Analysis Reports

Benefits Provided by PPM

- Scan paper orders at earliest opportunity in process reducing lost orders
- Import fax or email orders directly into electronic workflow processes
- Automate electronic workflow for approvals and/or reviews during order processes
- All authorized users have access to imaged orders simultaneously
- Store all electronic documents in single repository for easy access
- Eliminate "call backs," emailing and faxing via immediate access of all imaged documents
- Ease audit and research with easy access to all related documents with a few key strokes
- Automated distribution of commission statements and sales reports

Other Application Areas for PPM

As you can see, PPM can streamline almost any department and process within your company. In addition to those listed here, you can also apply PPM to even more granular areas including:

- Accounting reports with automated report distribution
- Expense report processing
- Secure, easily accessible personal "executive files"
- Fixed Assets-related documents
- Contracts and warranty documents
- Product specifications (including CAD drawings) and manuals

PPM Architecture

We briefly mentioned document retention policies when we discussed the Archiving components part of PPM's architecture.

Because regulatory compliance is such a critical part of doing business in today's marketplace, we're going to expand on how PPM can help your company stay in compliance while drastically reducing time and money consumed regulatory activities.

A complete PPM solution will provide the following functionality to make sure you remain compliant while minimizing security issues and costs:

- Stores records with associated metadata including the originator
- Automates the disposal of documents according to strict time controls
- Authenticates users and authorities
- Logical structure for records organization is independent of physical structure, allowing flexibility in management
- Centrally manages control over policies on:
    - Authority
    - Retention and Disposal
- Provides detailed audit trails
- Security against unauthorized access and accidental or deliberate loss of records
- Prevention against alteration

Big Picture Savings from PPM

While many of the benefits of a full PPM system are self-evident within departments, it's worthwhile to step back and take a look at the benefits as they apply to your entire corporate enterprise. Through PPM, the following benefits can be realized throughout your organization:

- Eliminate costly pre-printed forms and unsecured blank check stock
- Cut the paper chase between departments
- Eliminate instances of lost or missing documents
- Guarantee processing on-time with automatic routing
- Deliver documents electronically to reduce postage and handling costs
- Eliminate costs and requirements associated with paper storage and filing
- Eliminate photocopying of documents
- Decrease the time required to research discrepancies
- Streamline transaction, project and process approvals
- Improve the physical security over critical business documents
- Improve disaster recovery readiness for critical business documents
- Simplify the management, control and tracking of physical records
- Comply with regulatory, legal fiscal initiatives
- Streamline document and process approvals
- Improve the physical security over business documents
- Improve disaster recovery readiness for critical business information
- Simplify the management, control tracking of physical records
- Comply with regulatory, legal and fiscal initiatives

Conclusion: PPM Transcends Technology

PPM is as much a strategic shift in business culture as it is a technological upgrade. For that reason, PPM requires a strong long-term commitment from non-technical management teams as well as your IT professionals.

PPM will touch just about every employee in your company from the CEO down to the lobby receptionist. It changes how they work, how they communicate with each other, and how they work with vendors, customers and prospects. PPM radically alters how your staff manages their time and accomplishes their goals. And the good news is that all of these processes will take a radical shift for the better.

Implementing and installing a PPM solution also requires more participation from non-technical staff members when compared to other new solutions. This is because PPM, by its nature, cannot be plug-and-play. It is customized to your industry, to your IT infrastructure, and to your company's individual requirements. That is the secret behind PPM's far-reaching benefits: it fits into your company like a key fits into a lock.

The vendor will create a PPM solution just for you and it will cut costs, save time, streamline workflow, and eliminate paper from all of your business processes.

Appendix

IntelliChief PPM integrates into any ERP or line of business system environment. It will allow you to realize all of the benefits discussed in this white paper. And it will do so affordably while offering great reliability, customized professional services and proactive technical support.
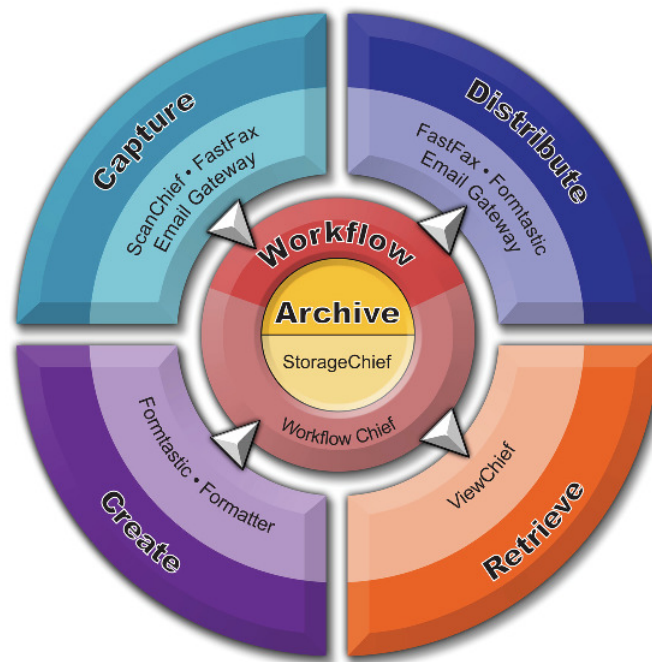
Additionally, our world-class professional services team will work closely with your staff to develop and test a customized, company and industry specific solution that will fully leverage your staff, your IT environment, and your current corporate culture without noticeable disruption to your ongoing workflow, and will maintain your data integrity.

For more information about IntelliChief PPM solution, please visit www.intellichief.com.

II. Frequently Asked Questions

1. Won't this method take more of my time?
Absolutely not. Through PPM countless manual tasks are eliminated while others are shortened exponentially. While there might be some changes to how you work with documents, the learning curve is not steep and you will ultimately be more productive.

2. What do we do with the paper after they it's scanned?
Short answer: Shred and throw it away. Long answer: That's going to depend on how much paper you have and your particular industry and its regulatory requirements. If you have massive amounts of paper, or if your data is particularly sensitive (as in the defense contracting industry for example), then the disposal process could require some planning yo maintain compliance.

3. If everything is an image, can I change it or make annotations?
Yes. Top quality PPM solutions keep your data dynamic. You will be able to edit and annotate your forms.

4. What do we do with our historical files?
The Archive component of PPM encompasses record management technology that will allow you to determine what is kept, what is destroyed and when.

5. Is the image quality as good as the original?
Actually, it might be better. You won't be using a standard scanner utility for PPM. PPM document scanning utilities (like 'virtual rescanning' or VRS) will allow you to clean up smudges, stains, colored backgrounds, murky fonts and other imperfections that hinder readability.

6. How hard is to find the image I'm looking for?
Incredibly easy. PPM allows you to search for a document using an unlimited number of criteria ranging from a PO number, company name, contact name, item number, product name, and on and on. If you can use an Internet search engine, then PPM won't be at all challenging.

7. By replacing manual steps are you also replacing people?
It may provide you the opportunity to re-purpose some staff to functions of greater need. In most cases PPM works to help current employees perform their jobs with greater efficiency and accuracy, accomplishing more in their typical workday.

8. I can't read things off the screen. How am I supposed to work with everything electronic?
If you have vision issues that impede your ability to read documents on-screen, then PPM can magnify forms very easily. If you simply can't stand reading documents on a monitor as a matter of preference, then PPM can very easily print a form using a standard printer and inexpensive 20-lb paper. Though this isn't quite "paperless,"it's still less expensive than using pre-printed forms and line-feed printers.