

Automated Mail Extraction, Imaging & Workflow Streamlines Mailroom Information Processes



INVESTMENT IN IMAGESOURCE'S MAIL PROCESSING SOLUTION PROVIDES SIGNIFICANT EFFICIENCIES AND DRIVES CONTINUED RETURNS FOR A VARIETY OF INDUSTRIES

INDUSTRIES

Financial Services, Retail, Healthcare

SOLUTION

Mail Processing & Workflow

CHALLENGE

- › Handle thousands of documents through incoming mail
- › Need to integrate automated mail opening, extraction & scanning with ECM software for workflow
- › Need to distribute mail processing to multiple, disparate locations
- › Need end-to-end solution for information on incoming documents, from mail extraction to capture to line-of-business systems

KEY BENEFITS

- › Reduction in labor to process mail
- › Increase processing speed and accuracy
- › Improve control and audit of processes
- › Improve ability to monitor processing performance
- › Improved access to information for processing, at any location
- › Direct integration with ECM and line-of-business software
- › Automating the routing and management of transaction information

For organizations that process large quantities of mail, the tremendous amount of labor required to open, sort and prep can make it difficult to realize a significant return on investment on imaging systems. Even using high volume scanners, manual mail processing can choke the efficiency of the system.

Financial Services Company Seeks Improved ROI, Efficiency & Accountability

This was indeed the case for a major financial services company that processes thousands of pieces of incoming mail daily. Because much of the mail is generated by consumers and clients, there is little uniformity.

The volume of mail was initially handled by 40 employees who manually opened and sorted the letters and documents, labeled them with bar codes for tracking, and delivered them to the appropriate teams for processing. The manual process was time consuming, prone to error and required an excess of resources.

When ImageSource was brought into the discovery phase, the company was looking for a solution to drive ROI. Based on a successful track record in Enterprise Content Management implementations, ImageSource was engaged to design and implement a system to capture, store, retrieve and process key documents used to fulfill mail requests.

Automated Mail Handling for Pre-Scanning Processes Recommended

ImageSource, specialists in fusing ECM technologies to best solve business process challenges, presented a solution that removed the human element for mail sort and prep. The automated mail processing solution integrates OPEX high speed scanners with integrated mail extraction and ECM technology that provides a repository and an electronic workflow.

Each operated by a single worker, two OPEX AS3690i scanners mechanically open mail, extract contents and scan the documents, together processing 800 pieces of mail per hour. All documents are automatically stamped with the scan date and a unique identifier.

Additionally, a flatbed and sheet-fed scanner are used for 10-20% of the incoming document capture. Captaris RightFax is utilized for incoming requests via fax.

ILINX Import injects the scanned images from all of the capture sources to Kofax Capture for validation of the document type and associated metadata. Users



quickly validate the auto-generated and default metadata for accuracy.

ILINX Release Script then delivers the indexed and validated documents to Oracle IPM. Once in IPM, an automated workflow routes the document to specific locations, based on work type, for processing.

Finally, ILINX Integrate allows users to view images housed in Oracle IPM from within other line-of-business applications, with the simple click of a button.

Company Realizes Huge Labor Savings, Improves Routing Efficiencies & Accuracy

Utilizing the OPEX integration with tier-one ECM technology, the company has benefited from end-to-end process improvements. The document imaging and workflow system, integrated seamlessly through ILINX technologies, enables the capture, storage, retrieval, and routing of documents arriving via the U.S. Mail and fax.

Web forms are utilized through Oracle IPM to distribute the workload to several hundred agents located in the U.S. and globally, which was not possible with the manual system.

Providing the fastest way to go from sealed envelope to usable data, the company has experienced sizeable ROI through a dramatic reduction in labor.

Digital Mailroom Use Case: Streamlining Accounts Payable Processes

By integrating the automated mailroom solution designed by ImageSource, a major Retailer can significantly increase ROI by decreasing labor required to process invoices at a central location.

Using a completely manual process to extract and scan contents from envelopes, up to five full time employees would be required. With peak volumes of up to 7,000 envelopes per day, the processes of incoming mail might often be carried over to the next day.

By deploying the ImageSource solution, opening, extracting and scanning is performed by one primary operator at a single workstation, providing crucial labor savings. The integration with Oracle IPM enables the automatic routing of invoices.

In addition, it can image-enable accounting software, like SAP or JD Edwards through a seamless integration. Ultimately, the efficiencies realized can also enable savings through early payment discounts.

Digital Mailroom Use Case: Healthcare Insurance & Claims Processing

A Healthcare Company, experiencing rapid growth and higher operating costs, needs to streamline claims processing. Their goal: fewer full-time employees and improved accuracy on every claim.

With the volume of incoming mail consistently around 5,000 envelopes per day, each averaging four documents, the total pieces of paper handled would total nearly 20,000. Ten full-time employees would be required to prep, extract and scan documents entering the business.

ImageSource's mailroom solution would allow the Company to complete all tasks at one specific location, reducing the need for 10 full-time employees down to 3. Claims can now be routed through an electronic Oracle IPM workflow, eliminating misplaced or misdirected documents. Agents have immediate access to information that previously may have taken days to obtain.

Improved Efficiency & Performance for Any Organization Processing Large Quantities of Incoming Mail

By integrating the automation of mail processing with the routing and management of transactional information—purchase orders, claims, invoices, applications and credit information—critical business processes are greatly streamlined. Access to information can be extended to virtually anyone at any location, enabling the distribution of business process to any location.

“The ImageSource Solution utilizing OPEX scanners, ILINX technology and Oracle IPM is the perfect answer for organizations that process large quantities of mail and need an effective workflow,” said Terry Butler, CSO, ImageSource. “The result from this pairing of technology translates to tremendous ROI for our Customer Partners.”

Technology



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ILINX RELEASE SCRIPT
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