

Non-Profit Research & Analysis Organization Optimizes Contract and Grant Services Approval Process with ECM System



THINK TANK REPLACED MANUAL, PAPER-BASED WORK PROCESSES, IMPLEMENTING A STATE-OF-THE-ART ELECTRONIC DOCUMENT MANAGEMENT SYSTEM THAT CAN RECAPTURE SIGNIFICANT STAFF TIME AND SAVE COSTS FOR PAPER, PHOTOCOPYING, STORAGE, POSTAGE & DOCUMENT RETRIEVAL.

INDUSTRY

Non-profit Research and Analysis

SOLUTION

Content Management

CHALLENGE

- › Handle approximately 600,000 pages of information in paper format
- › Hardcopy distribution of file information for management and review process required a significant amount of time and resources
- › Provide secure access to file information throughout US and International Offices
- › Management information, like where a contract was in the review process, was difficult to compile

KEY BENEFITS

- › Electronic files reduce storage space and document retrieval time
- › Recapture valuable resources through automation and optimized work processes
- › Integrate with existing Oracle E-Business Suite
- › Improve file uniformity and audit capabilities
- › Support multi-site secure web collaboration
- › Provide the foundation for future technology solutions

This established nonprofit institution helps improve policy and decision making through research and analysis for the public and private sectors. The contracts, grants, and contributions that fund their research and analysis generate thousand of pages of documents each year. Until recently, more than half a million pages of these documents were housed at a single site.

Before the ImageSource® solution, hardcopy folders were maintained for all documentation, including proposals to clients, contracts, subcontracts, supporting documentation and numerous other contractual agreements. The contract & grant division, located at the corporate headquarters, administers such documents.

Challenged with Handling Over 600,000 Pages of Information

A significant amount of time and resources had been spent maintaining the accuracy and distribution of these paper files. They were continually updated and amended throughout the contract life cycle. Hardcopy distribution of between 10-20 copies each occurred for much of the folder documentation. With over 1,500 employees worldwide, documents had to be shipped globally.

At the Santa Monica office, 50 two-drawer file cabinets stored over 600,000 pages of information.

A Hard to Track, Manual Workflow

The management review and approval workflow process supporting the organization's contract services was primarily manual. Each proposal and contract went through an extensive review and

approval process. The workflow frequently involved many different teams of experts located throughout a few principal offices in the United States, as well as international sites.

Signed reviews and approvals were received in several formats including hard copy signatures, faxes, and emails tracked on Excel spreadsheets. Management information, such as where a contract was in the review process, was difficult to compile.



Looking for a Solution that would Provide Efficiency, Collaboration & Access

The Organization determined it was time to rethink their contract management work processes from the ground up. They turned to Olympia-based solutions provider ImageSource to assist them in moving from a primarily paper-based environment over to electronic workflow processes.

The following business objectives for the new electronic document management system were defined:

- › Reduce storage space and document retrieval time
- › Recover valuable resources by using automation and optimized work processes
- › Implement efficient, flexible, accurate and secure electronic workflow processes
- › Integrate with existing Oracle E-Business Suite
- › Improve file uniformity
- › Ability to support multi-site secured web collaboration
- › Improve audit capabilities
- › Provide the foundation for future technology solutions

The Organization was looking for a solution provider that would not only assist in addressing their immediate business needs, but would also provide comprehensive training and ongoing support.

Contract Approval: An Optimized and Secure Process

ImageSource designed and implemented a system that provided the technologies and infrastructure needed to optimize the work process supporting the Organization's contract approval process.

When a document arrives, it is now scanned and indexed utilizing Kofax Ascent Capture software. This automation ensures the immediate security and protection of critical documentation from loss or destruction. Data is automatically retrieved from the Oracle system, and displayed on the new workflow form. This data also defines distribution and security rules. The record then seamlessly enters the Oracle Imaging and Process Management software.

To display the most current information and related images for each contract, a customized web form (within Oracle) was created by ImageSource. The form is available on employees' desktops, regardless of location. Employees have access only to those contracts assigned to them for review or approval. Throughout the approval process, the form provides an interface to review contracts. Functionality is built in for re-

viewer to add comments. When a review or approval is completed, the system saves any new comments that person has provided. An email is automatically sent, notifying the next person in the process that the contract package is ready for their review.

Recaptures Valuable Time and Resources

Before the ImageSource solution was implemented, the Organization spent a significant amount of time and resources maintaining, accessing, copying and distributing files to the right people. Now, they use the new system to choose the individual reviewers and define the order for review. The system automatically moves all of the information through the selected review and approval channels. The solution provides a complete audit history of each contract—tracking how long it takes to do a review, and where it is in the approval process. It also has built-in security features that allow management to determine who has access to what contracts, documents, and searches.

"Our Customer Partner took ownership of their system very early on. They recognized the value of training and developing a comprehensive understanding of these systems. Then they immediately applied this knowledge to further enhance their internal training and business needs," says Shad White, Chief Technology Officer of ImageSource.

The Organization replaced laborious and manual paper-based work processes with a state-of-the-art electronic document management system. The implementation provides the infrastructure to recapture important staff time and save costs annually associated with paper supplies, photocopying, storage, postage and document retrieval for audits.

The best technologies, combined with ImageSource's expertise and methodologies, optimized each step of the contract services process. The business objectives outlined for this project were successfully met. The anticipated results include improved employee productivity, more timely access to information and reduced costs.

Technology



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