



DMS GUIDE:
STOP LETTING
DOCUMENT-DRIVEN WORK
SLOW YOU DOWN

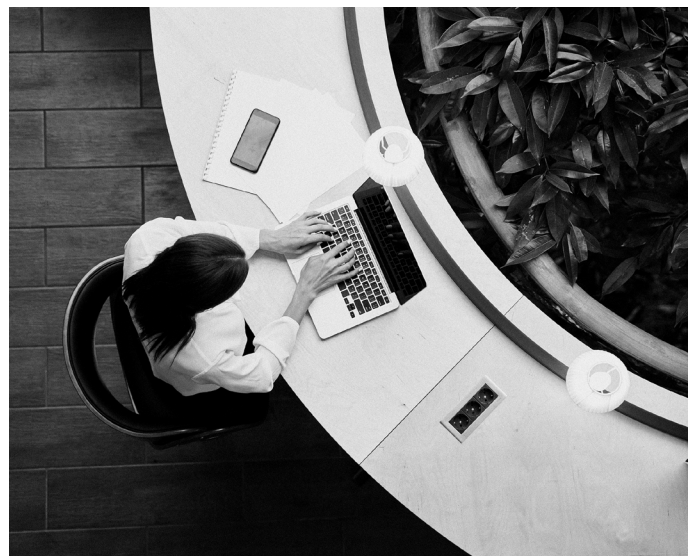
 **REVVER**



If you're considering a document management solution, then you may already be aware of certain issues within your organization that you want to be resolved or of certain practices and processes that should be streamlined. Document management can help iron out a number of a business's messy paperwork processes and protocols, but it's important to have one or two goals in mind when preparing to invest in such a solution.

Document management solutions can be instrumental in making effective changes throughout the business, but it's best when used to tackle a specific issue. Then you can see it work in full force and get a little more insight into how you can change how your office works on a day-to-day basis.

There are a great number of issues that businesses deal with that can be solved or improved with document management. Many of these challenges are a result of many years of traditionally executing certain practices, without ever making an effort to adapt to changing times and technology. Some problems are simply related to a need to cut costs or improve revenue margins, while others consist of making processes more efficient and accurate. These are some of the most common problems that document management can help you with.



DEALING WITH DIGITAL DOCUMENTS

The digital alternative for businesses to keep paper records, contracts and invoices has recently become an essential rather than a luxury. Yet they believe they lack the resources or the knowledge to make the transition. Converting all of your paper records can sound like a lofty goal, almost impossible without expending lots of money and time. However, one of document management's best tricks is making the process of going paperless, painless.

Going into document management with the express goal of taking your office paperless means you can plan your implementation around that specific goal. Services often work with your company's needs in mind during the initial setup of the system.

Revver can set up the system to scan large volumes of documents and extract the data. Templates for standard forms allow the software to recognize what kind of form it is and identify the content in selected fields of the document. The document management system can then use that recorded metadata to file those documents in the right place, in accordance with how the company wants it filed. With just some preplanning and set up, the software does the complicated work for you.

It's not an overnight transition, unfortunately, but as long as you go in with a plan and a team that's open to doing certain things differently, you'll quickly settle into being a paperless office.

CONSTANTLY LOSING IMPORTANT DOCUMENTS

Disorganization is the enemy of individuals and businesses alike who like to remain productive and tidy. It's understandable though, that the more documents you deal with, the greater the chance of something getting misplaced, or filed in a location so obscure it might as well have been filed randomly.

Having to go hunting for a stray document is a time-consuming, resource-wasting endeavor that puts a damper on any workday. If the document in question needs to be found urgently, you'll have to get more than one person on the task, multiplying your loss of labor hours. Sometimes the document isn't necessarily lost, but the filing system put in place for your office's records is overly complicated and only understood by a few. If those people who put the filing system in place leave, you'll be hard-pressed to decipher their methods. This is the worst when it's a physical document lost in a collection of filing cabinets, but losing an electronic document is hardly any better. Now multiply this loss of resources tenfold for the average amount of documents your organization deals with.

That's where document management improves on electronic file storage and soars above physical filing cabinet systems. Optical character recognition (OCR) allows for full-text searching of documents, meaning you can search for documents throughout the system with far more than just the file name. So even if you don't know the name of the file, if you know what kind of document it is, you can search using text that you know is on the document like a client name, property address, account number, etc. Once you find it, you can use the results to take you to where the document is filed to have full access to the folder it's in.

When organizing your standard folders within Revver, wouldn't you like to know what folders are missing documents that should be there? For HR, how many employees don't have an updated I-9 form? For accountants, which of your clients haven't submitted their W-4 or other income documents? A missing item search allows users to easily check multiple folders or drawers for items that should be in them.

You can make searching for documents even simpler by essentially bookmarking documents for quick browsing later in your personal document portfolio. If there's a document you think you'll be working with a lot, you can add it to a portfolio of your choosing with just a couple of clicks. You'll be able to instantly find it later.

STREAMLINE REDUNDANT, TIME-WASTING PROCESSES

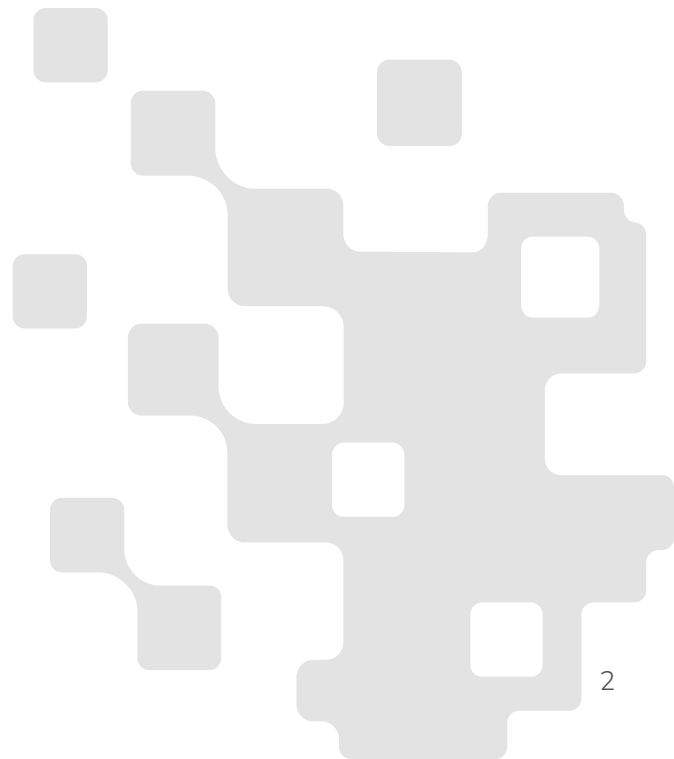
Have you been waiting to move on to the next stage of a project, but you're waiting on a set of documents to be reviewed by multiple people and need their stamp of approval before you can do anything? If you could just get this stage of the process done faster, you could probably already be on to your next value-adding project for the organization.

When documents like invoices or contracts need to go through certain avenues, things tend to bottleneck if someone along the chain fails to follow through on their part, such as reviewing it, approving it, or getting it to the next person in the process. While these may seem like simple tasks, they pile up if they're not done in a timely, consistent manner.

If you find work getting slowed down from this issue, maybe it's time to look into a solution that can automate these tasks. Workflow automation is a tool that allows you to keep documents moving until the work is done. Workflows consist of stages of actions set off by different triggers. You can create a workflow that dictates that documents from a specific client need to be forwarded to a specific user for them to review.

You can even create intricate workflows that keep the flow of paperwork moving from person-to-person until it's finally archived. Thanks to OCR technology, the system can work with certain values contained on the pages, like dollar amounts or checkboxes. For an accounts payable workflow, you can set the system to forward an invoice with any dollar amount below \$100 to be paid and archived, but anything over \$100 is forwarded to an accounting supervisor to review and approve the invoice before it is paid.

All of this streamlining saves on labor hours. Instead of chasing signatures or tracking down who has a form they need, your people can be working on more productive tasks.





NEW WAYS TO WORK WITH YOUR DOCUMENTS

Rather than having documents just sit in storage, there are ways to make them continue to be useful. Having your documents in a digital space provides you with new ways to interact with them. An intuitive UI that allows you to view multiple documents at the same time is useful for comparing different documents or even different versions of the same document. Tools for editing, collecting metadata, adjusting security and permissions, and attaching governance rules for compliance eliminate the tedious document-driven work your organization deals with.

The information contained in your digital documents doesn't have to remain stationary either. Utilizing OCR technology and intelligent analytics, these digital interfaces can deliver our desired data in the form of easy-to-read visual reports. Now every new document you enter into your paperless system can help further paint a picture of your business by adding new data points to your revenue charts, inventory rates, accounts payable, etc.

Revver contains a module for collecting metadata through Zonal OCR and allows users to build reporting dashboards with this advanced analytics engine.

CONCLUSION

These are just a few of the problems that businesses everywhere deal with that document management sets out to solve. The fact is, paperwork is an important part of getting business done, but too many companies are spending too much time on outdated practices that make paperwork more of a burden. By focusing on the business aspect of paperwork, and not on the paper itself, businesses can get so much more done - more than they thought was possible with the resources at hand.

It's all done by rethinking how you handle paperwork, not just by digitizing it but keeping it working for you and more accessible than ever. You can save on time by eliminating the chances of wasted labor and creating more opportunities to improve your business processes.

Reimagine your workday. Contact us to learn more!
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Let's Talk >



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