

ENTERPRISE CAPTURE AND SHAREPOINT: A COMPLETE ECM SOLUTION



PART 4: USING CAPTURE AND SHAREPOINT TO DRIVE AUTOMATION

BY ALLEN CARNEY, VP OF PRODUCT MARKETING AT KOFAX

According to a recent AllM study on capturing data to business processes, 66 percent of organizations still carry out some form of manual indexing. Manual processes are costly and inefficient. They consume the valuable time and skills of highly trained employees, who can be better leveraged when focused on higher value tasks, such as customer responsiveness and revenue generation. Reliance on manual input also increases the likelihood of costly errors slowing critical business processes even further. Erroneous data in SharePoint repositories makes collaboration, analytics and process automation more difficult, decreasing the value of a SharePoint investment.

One solution is to automate specific processes within SharePoint using capture driven business process automation. Automation eliminates touch points, removing the costs and errors associated with manual input. To effectively automate processes within SharePoint, documents must be automatically classified as soon as they first touch the enterprise. Automatic classification ensures that documents are released into a SharePoint repository with the correct indexing information. The capture process can classify documents and information can be extracted based on the document type and business rules. Consistent business rules are then applied to content as it

is released into SharePoint, removing the need for manual preparation such as bar coding and preparation sheets.

SharePoint 2010 introduced a number of new features that further facilitate the automation of business processes. The new content organizer allows SharePoint to automatically manipulate content based on pre-defined business rules that act on the content column or metadata. The content organizer creates a new library type called the drop-off library. When content appears in the drop-off library, the rules engine evaluates the content against the rules, and acts accordingly. For example, a document can be automatically moved to a specific library depending on a key word in the title, thus reducing the risk that manual input will direct a document to the wrong library. As a result, the search for and retrieval of valuable information within a repository becomes considerably faster.

In addition, extended workflow features are also included in SharePoint 2010. Users can associate a workflow with a specific document type. As soon as a document is captured through capture driven business process automation, the associated workflow is automatically initiated, removing the need for user intervention, which can slow the process. A knowledge worker can capture a document using an MFP or a Web-



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based client. Information is then extracted from the image, validated and delivered to SharePoint, immediately triggering the assigned back-end processes. Decision points in the workflow can act on the column data provided during the capture process.

By using accurate, complete metadata contained within a SharePoint repository to drive downstream processes, organizations optimize

SharePoint resources throughout the enterprise. Employees can share and leverage information to make better decisions. Efficiency increases across the organization, while operational costs are reduced. By integrating capture driven business process automation and SharePoint, organizations can benefit from a cost-effective enterprise content management system that delivers a measurable ROI in record time.

ABOUT THE AUTHOR



KOFAX 

Allen Carney, VP of product marketing at Kofax

Allen Carney leads the development and implementation of Kofax product marketing strategy. Earlier, he was VP of Marketing for 170 Systems, a developer of invoice processing automation solutions that was acquired by Kofax in September, 2009. Previously, Allen served as VP of Marketing for NMS Communications, a developer of telecommunications components and solutions, VP of Marketing at Lotus Development Corporation, where he was responsible for Applications and International Marketing, and as VP of European Operations for Atex, a developer of prepress automation solutions. Allen holds a Bachelors of Arts degree from Yale University.
