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SMALL ENTERPRISE INTEGRATION-VAR SOLUTIONS

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Introduction

Often, implementation of an enterprise class application such as document management software does not gain wide use within a company, organizational acceptance, or full return on investment without tying the entire business process together. For these three elements to be realized, it is often necessary to complete the puzzle by integration with third party applications such as accounting software, personnel management applications, or other line of business software products. This document will elaborate on some integration points and demonstrate the value add of integrating line of business applications with document management software.

The Problem

A small to medium sized enterprise is overwhelmed with the volume of documentation associated with many line of business processes. From order processing to purchasing, and even human resource functions can produce large amounts of paper based documentation. A decision is made to implement a document management product to help streamline the flow of business documents.

Upon successfully implementing the document management software, efficiencies have improved and the business process is running more efficiently. However, after studying the new electronic workflow process using document management, new inefficiencies are generated because a 'missing link' is found. Failure to integrate to line of business applications has caused extra data entry, the need to access multiple applications to retrieve documents and data, and confusion on where to look for specific information relating to a transaction.

The company decides to see how things can be improved. After reviewing the process further, it is discovered that integration of the key line of business application with some of the document management functions would greatly improve and streamline the process of handling documents and data.

Where to Begin

The company first began by contacting the local Value Added Reseller (VAR) that implemented the document management and line of business application. The specific points of streamlining the process using integration are covered. These points may include the following:

1. The ability to have the line of business application create a 'Folder' in the document management application automatically as a client record is added to the application database.
2. The ability to retrieve documents directly from the document management software while working in the line of business application.
3. The ability to automatically file documents created by the line of business application to the appropriate location in the document management software.
4. The ability to route documents as they are created to appropriate workflows.

Benefits of Integration

The expected benefits from the integration are as follows:

1. Eliminate duplicate data entry between line of business applications and the document management application. This step reduces data entry time, data errors, and missing or incorrect information.
2. Eliminate the need to run two applications. One for line of business and one to lookup and retrieve documents. This increases productivity by reducing searching time in multiple applications. Information is more quickly available for retrieval with a mouse click.
3. Eliminate the need to scan paper documents. This dramatically improves time to file documents and increases filing accuracy.
4. As the documents are filed, they are routed to workflow to increase productivity of document handling and tracking.

VAR Involvement

By bringing the VAR into the integration, the company has a central point of contact for management of all aspects of the project. The VAR manages the line of business application, the document management solution, and the custom integration project. This single point of contact ensures continuity when upgrades occur to any of the applications. The benefits of the single contact are realized when problems arise and need to be solved quickly and efficiently. The VAR is also a specialist in problem solving and knows the feature and functions of each application involved in the integration. All of these elements add up to a successful role out of the integrated solution.

Keys to Ensuring Success

With any integration project, it is essential to provide the following requirements to the VAR.

1. Clearly define the goals and objectives of the integration functions. Specify the functionality desired and how you envision the integration working.
2. Ensure that applications being integrated can be modified for use. Find out if an Application Programming Interface (API) is available both for the document management software and the line of business application.
3. Understand the VAR costs and scope of work. It is important to note that any changes in the scope or function of the integration will likely have additional charges.
4. Communicate any changes or additions in writing with the project manager. Do not assume anything! Write it down so all parties involved know the expectation level of what is to be accomplished, time frame to accomplish, and cost involved.

Some Example Solutions

Example One

A manufacturing company produces large invoice runs. The invoices are currently printed to paper and then scanned to the document management software for archive and retrieval. The associated documentation for pick list and shipping information is printed and sent to the warehouse where the warehouse staff makes notations of what is shipped and the shipping company signs off on the documentation.

The process is streamlined by producing an electronic text file of the invoices. The VAR creates a software solution to capture the electronic invoice file, splits the file into individual invoices, merges the invoice information to an overlay of the company invoice, generates a searchable PDF, and files the document to the document repository. This process is 100% automated and requires no user intervention.

The second step of the process streamlines the filing of the external shipping paperwork. As the pick lists are generated from the accounting application, the invoice number is printed on the document in barcode format. When the documents are returned from the warehouse to the accounting department, the documents are scanned, the barcodes are read, and the paperwork is automatically 'attached' to the original invoice which was filed in the automated process.

By automating these two basic processes, vast amounts of time and resources are saved in document handling. The company increased efficiency by integration of the accounting application process and the document management process.

Example Two

A third party medical billing company receives large volumes of paper based explanation of benefits (EOB) documents from the insurance carriers to which claims are submitted. These documents are then scanned and filed to the document management system. The efficiency gains of having the documents electronically available after scanning are significant, but the time to scan and file has not saved much time over the paper based process. In addition, the billing company uses an internal database to manage client contact information and would like the ability to access documents stored in the document repository, directly from the internal database.

The VAR is brought in to help solve the paper based filing process. The VAR determines that the insurance carriers can provide the EOB in electronic format (PDF) to the billing company. The PDF document is one large file with multiple patient EOBs in the file. These must be split and separated for filing to the document management software.

The VAR puts together a solution that splits the EOB to individual patient PDF files based on the content of the document. The individual PDF files are saved to disk. The VAR created an automated service that reads the file names on disk and moves the files to the appropriate storage location in the document management repository.

The VAR also uses the application programming interface (API) provided by the document management software company to integrate the document retrieval from within the internal database. A button was placed in the database to retrieve documents directly from the document repository based on the current record being viewed in the database.

This process completed the document filing solution and eliminated the need to process thousands of pieces of paper via scanning. It also allowed the users of the internal contact database to run a single application to manage the client data and retrieve electronic documentation from a central application. Efficiency improved dramatically by completing and streamlining the existing electronic document processes.

Conclusion

Integration of line of business applications with the document management functions is often a necessity rather than a 'nicety'. Fully gaining the benefits of document management, corporate acceptance to the document management processes, and maximum return on investment are not realized until these functions are implemented across the business applications.

It is important to bring in knowledgeable professionals to assist with the integration of the total solution. VAR solution providers offer experience and the technical expertise to complete the project in a professional and timely manner.