

Manage secure, efficient document capture processes with **Nuance AutoStore.**

Assure faster, secure and more cost efficient operations through a cohesive system.

Challenge

- Manage paper processes, inter-agency collaboration, ease of document retrieval, and meet electronic filing compliance
- Integrate a mixed fleet of scanners and MFDs with a software solution to create a secure enterprise-wide system for document capture, distribution and storage

Solution

- Provide document processing and the ability to plug in to back-end document repository with little or no customization

Results

- Files can be shared electronically and retrieved quickly
- Electronic workflows ensure consistency throughout document capture process
- Eliminating boxes of paper files reduces storage space requirements, saving money

Profile

The Oregon Department of Justice (DOJ), led by the state's Attorney General, is responsible for general counsel and supervision of all civil actions and legal proceedings in which the state is a part or has an interest. Headquartered in Salem, the DOJ operates several program areas designated by the legislature, such as child support, district attorney assistance, crime victim compensation, charitable activity enforcement and consumer protection services.



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Dan Ramos
Enterprise Technology Services Manager
Oregon Department of Justice

Challenge.

With legal oversight for a variety of activities, DOJ was a paper-rich environment, logging hundreds of documents a day, resulting in thousands of pages that had to be reviewed, acted upon by numerous people, and finally stored in a secure repository.

Looking to manage its paper processes and inter-agency collaboration better, make retrieving documents easier, and to meet electronic filing compliance for the court system, DOJ looked to Dan Ramos, Enterprise Technology Services Manager and Karen Yakis, Customer Support Analyst, to identify challenges and create a best practices environment that would bring greater efficiencies, save taxpayer dollars, and enhance services to the citizens of Oregon.

Solution.

According to Ramos, the initial focus was a two-pronged approach. First was the need to create a consistent, cost efficient and secure way to create PDFs. The second was an enterprise scanning initiative leveraging a mixed fleet of high speed scanners and multifunction devices (MFDs) with a software solution that could be utilized on all hardware devices easily. The software would create searchable PDFs that could be delivered securely to the court system or to the agency’s document repository.

The search for a solution would take DOJ about six months. Ultimately DOJ choose Nuance AutoStore® and the Enterprise Service Delivery group from Ricoh to fill the need for managing its workflows. “We especially liked the flexibility AutoStore offered with our mixed fleet,” said Ramos. “Because of its flexibility we were able to integrate the software easily into all our hardware devices – even the older models – and we weren’t forced to upgrade equipment that still had life immediately.”

Another important aspect of the Nuance solution was its robust optical character recognition (OCR) ability. “Because we are dealing with so much paper that needs to be searchable, especially the PDFs that are sent to the court system, we are now able to have multiple OCR engines on one server,” he added. Other aspects that led to the selection included AutoStore’s fee and licensing structure, its ability to plug in to the back-end document management repository and the fact that it needed little or no customization. “It was basically an out of the box solution, so we were able to fire up a workflow with AutoStore, and get up and running without excessive customization,” Yakis added.

Working to support charitable activities and consumer protection.

The Charitable Activities area at DOJ monitors charitable organizations throughout the state. There are certain documents that each organization files annually in order to maintain its tax exempt status. There are thousands of charities in Oregon, generating many thousands of pages of compliance documents.

As part of the implementation, Yakis and Ricoh visited directly with the Charitable Activities section. “They showed us their processes: how paper was entered into the system, where it was stored, how files were opened and modified, and how completed files were put to rest in the archive. Using AutoStore, we created an electronic workflow that mimics the manual process closely. When paper is scanned, a form pops up on the user’s computer. The required fields can be filled out quickly—and are the same as in the document management system. This creates a naming consistency. The scanning and OCR occurs to create a case file. When additional documents come in for that case, users simply scan and add them to the existing case file in the document management repository,” said Yakis.

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The agency had little or no electronic means for tracking or sharing files, and the section was literally running out of storage space in their file room. “Today those same files can be shared electronically and retrieved from the repository quickly without the physical labor required to go fishing through file cabinets, shelves, or boxes of hard copy documents,” Ramos noted. “And when the public requires information, we can respond faster via email with an electronic file attachment.”

The Consumer Protection section handles financial fraud. There can be up to 100 complaints received a day and each of those complaints is required to have an initial response within a set timeframe. “This was also a manual process,” said Yakis. “We put in a workflow similar to the one created for the charitable group. Now when files come in, they are digitized and available immediately to the enforcement officer or to the public. Eventually, these are transferred to the document management repository where they are held for a minimum period of five years or longer as required by the State Archivist. In most cases now, files are available to enforcement officers, investigators, attorneys and staff within 24 hours of receipt, and as a result, Oregon consumers receive more timely responses and faster complaint resolution.”

Results.

Currently six of the DOJ’s nine divisions are using AutoStore; others are in line to develop workflows and additional OCR capabilities to meet their individual specifications. As the project progresses, it’s likely each division will have at least two different workflows feeding into the document management repository, and it will be easy to create additional workflows, if necessary. “The real consistency of the system comes into play when users fill out the initial AutoStore form. When users have a document on the scanner, the scanner brings up Nuance’s QuickCapture Pro® which directs the AutoStore server to bring up an electronic form on the computer that’s part of the electronic workflow. The user fills out

the required fields on the form, submits the form and scanned document to the AutoStore server where it’s OCR’ed and sent to the document management repository,” said Yakis.

Along with the DOJ’s new PDF file conformity, it has also gained consistency using electronic workflows with routing and standard file naming conventions making it very easy to collaborate, view and retrieve documents. “Previously, there was inconsistency in file names which made it extremely difficult to access files from the shared drive. With the Nuance solution, the users created a consistent naming convention up front. Today, there are a number of ways you can find a document,” Yakis added.

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In terms of specific dollar returns, DOJ indicates that they are currently spending about \$135,000 a year to maintain storage facilities. While these costs will not be reduced most likely, they won’t be increased due to the savings gained from electronic file storage. “We’re practicing cost avoidance with this system,” Ramos said. “And that’s a very good thing in an environment that is focused on creating best practices to reduce spending and serve our state’s taxpayers better.”

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