

Manage secure business processes with Nuance AutoStore.

Assure faster and more cost efficient operations through a cohesive system across departments.

Challenge

- A scalable solution that allows documents to be scanned into the new DMS system directly
- Offer a comfortable and reliable workflow for digitizing roughly 700 documents exchanged with customers on a monthly basis

Solution

- Enable users to both design and apply complete document workflows easily
- Capture all processing information in a barcode; scanning the barcode sets the workflow process in motion

Results

- Reduced risk of scanning errors
- Ensured compliance and traceability
- Simplified the scanning process for users. Instead of three manual steps the capture process could be reduced to one step

Profile

KPMG is a leading provider of professional services in Ireland. The organization works with clients in all sectors of Irish business, providing a range of audit, tax and advisory services. The cornerstones of KPMG's business are quality of advice, quality of service, and quality of people. The firm has 78 partners and 1,750 people in offices in Dublin, Cork, Galway and Belfast.



In March 2010, the decision was made to introduce a new document management system at KPMG Ireland. Among the critical components of the planned installation was a scalable scanning solution that allowed documents to be scanned into the new DMS system directly.

Peter McNeill, IT Manager at KPMG Ireland, explains why scanning workflows have a considerable impact on the productivity of the 1,700 knowledge workers in the offices at Dublin, Cork, Galway and Belfast.

“Prior to the new solution, the process of digitizing paper documents at KPMG usually required several steps, including “scan-to-email” at the multifunction device (MFD), then returning to the desk, retrieving the scanned document from the mailbox, to eventually rename it, share it and archive it.”

Since the correspondence between customers and practitioners is considered critical documentation, it was imperative to offer a comfortable and reliable workflow to digitize roughly 700 documents exchanged with customers on a monthly basis.

One of the integration partners of KPMG suggested the use of Nuance AutoStore, a capable capture software that supports any possible scanning method effectively and connects with the new DMS system Autonomy iManage seamlessly.

Furthermore, Nuance provided a practical enhancement for the software, called Smartticket™. This module enables users to both design and apply complete document workflows easily. All settings which define the processing, routing and archiving of a scanned document are summarized in a barcode that users can comfortably generate using a web interface at their desktops.

Depending on type of document, department or customer, a user can either print out a Smartticket including this barcode as a cover sheet and use it when scanning documents, or select one existing Smartticket at the front panel of the MFD in the form of

a button. Since all processing information is captured in the barcode, the simple scanning process sets the respective workflow in motion.

Benefits and ROI.

Today, the users at KPMG have come to rely on Nuance Smartticket to categorise scans and route them to the correct document repository within their @file (Interwoven) system. The user creates a Smartticket at his PC and either prints the ticket at one of over 100 Xerox MFDs, or stores it as a Smartticket.

Once the user is ready to scan, he walks up to the MFD, authenticates with his building access swipe card and selects “@File” from the MFD options. The user is presented with 3 buttons: Folder Browse, Smartticket and e-Ticket.

By selecting Smartticket, the user can scan with a printed Smartticket; the scans are processed by AutoStore and placed in the correct folder.

By selecting e-Ticket, the users are presented with a list of all their Smarttickets; they can just select one and scan the documents. This means they do not have to print the ticket at all, which reduces the risk of scanning errors on the barcode recognition.

By selecting the Folder Browse, users can browse the @file (Autonomy iManage) folder structure and select where to scan. This was implemented as a quick and easy method to scan directly into Interwoven.

How AutoStore improves document workflows.

When asked for the major benefits of the new capture workflows, Peter McNeill sees three main effects today:

- Reduced risk of scanning errors.
- Ensured compliance and traceability; AutoStore’s Workflow Tracker audit tracks all scans.
- Simplified scanning process for users. Instead of three manual steps, the capture process could be reduced to one step.

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