

# Automate your processes

Redesign your business processes and deliver improved services to your clients.

Docufree's workflow automation is the ultimate step in transforming the documents you hate into paperless transactions you love. With workflow, you can automatically route documents for processing and approval based on business rules that you set, while automatic alerts ensure prompt completion.

## Features Overview

Benefit from several features, including:

- **Workflow.** Route documents to people and groups for approval and initiate automated processing without human intervention for efficient document management.
- **Groups.** Give multiple people access to a similar set of tasks so they can work together and get work done faster.
- **Conditions and Rules.** Create document flows with conditions to follow one path or parallel steps. Create rules to trigger actions such as populating indexes or setting a status.
- **Configurable.** Configure the solution for your rules with flexible tools. Configure the workflow rules, customize statuses, provide instructional notes, and handle exceptions.
- **Routing.** Route scanned documents and those received via email or fax.
- **Set Document Types.** Establish the document type such as invoice or contract based on the method received like email or fax and then route it to the proper workflow path.
- **Set Current Date.** Via workflow, automatically populate a date field with today's date.
- **OCR Routing.** With OCR, locate a word on a document for identification purposes to then route it via a specific workflow path.
- **Barcode Routing.** Route documents automatically based on a scanned barcode that can split, upload, and index the document via workflow.
- **eForms.** Route forms through workflow. For example, open a form, fill out the data, submit the form and it route it through workflow for approval. The data populates indexes to become searchable data. The master form remains in place unchanged for others to use.
- **Timers.** Set escalation timers for routing tasks to others when tasks stall.
- **Proactive Notifications.** Send email notification alerting a person to take the next task step.
- **Stay in the Loop.** Receive notifications when tasks are completed by others or when they are past due.

- **Task Completion.** Receive notifications when a document completes a step in the workflow or finishes entirely.
- **Service Notification.** Via a web service, compare a document index to an internal database and receive notifications for non-matching files.
- **Notification Configuration.** Configure specific details of the email body such as the file name, date and index value. For example, this file <insert file name> regarding vendor <insert index value for vendor name> has completed the ABC Workflow.
- **Inform Users.** Users can see when tasks were created and when they are due. They will receive instant feedback on tasks that are overdue via a timing feature.
- **Quality Control.** Establish quality controls to review a percentage of your team's work.
- **New Hire Control.** Create specific rules for new hires to review a higher percentage of their work.
- **Take Control.** Monitor, manage, and change in-flight tasks through administrative workflow monitoring tools.
- **Task Reassignment.** Reassign tasks when someone is out of the office for a short or long time period.
- **Require Information.** Ensure that vital information is entered when needed. Establish complex rules such as requiring information on task approval but not upon rejection.
- **Exceptions.** Create special rules for escalating exceptions in your process. For example, if an amount exceeds \$1000, route it for further approval.
- **Find Problems.** Compare values such as actual cost and target costs or ensure actual charges are within a percentage of the estimated charges.
- **Collaboration and Notes.** Provide notes so team members can collaborate through email on tasks.
- **Simplify.** Automatically assign indexes via your rules or rename files to ensure a standard naming convention.
- **Share.** Share documents securely via email including non-users.
- **Auto Archival.** At completion of the workflow, route documents to specific folders such as Vendor, Document Type, and Date, for proper archived filing.
- **Audit.** See who did each task, when it was done, and where it is in your process.
- **Integration.** Tie into existing systems to exchange information and eliminate duplicate work

## How It Works

Consider an example for Accounts Payable (AP). Automation begins with receipt of the invoices. Invoices are routed electronically to Docufree through email or fax ingestion. Mailed invoices are received at the Docufree Conversion Center where they are opened, scanned, and indexed by Docufree Specialists. Workflow matches and loads vendor information auto-populating several additional fields. Invoices are routed to AP specialists for final acceptance and approval. Exceptions such as large dollar invoice amounts are routed to multiple approvers for sign-off. Once completed, the invoice information is sent to the internal financial system to update the status of the invoice.

As you work your task:

- You'll see the task name with an image of the document.
- You'll see directions that are provided which are configured by your organization for each task
- You have the ability to choose a status if designed in the workflow such as approved or rejected.
- You can enter notes which can be searched on later.
- You submit the task and it automatically moves to the next step.

### Further information

For more details on our document solutions, visit [www.docufree.com](http://www.docufree.com) or call (877) 362-3569



- For each document, you can see a visual diagram and the history of workflow with detailed descriptions of tasks completed, where it is, and what is left.

## Letters and Emails

While working on your tasks, you may need to generate some type of communication or final document. As an optional service, letters and emails can be generated by Docufree Workflow.

- Letters are used to generate correspondence to someone that is not a Docufree user. For example, if you want to produce a standard letter based on the status of a document, Docufree Workflow can create a printable letter.
- Emails are helpful if you need to notify someone regarding a task in your process. For example, during your process you may need to notify a supplier or vendor regarding status. Workflow can automatically generate an email as part of your process.

## Integration

As optional professional services, you can connect to internal systems for passing information to or from the Docufree solution.

- **Extract Services.** Provide data extraction, transformation, and loading. This is used to pull many data elements based on a unique identifier. For example, a user can enter a vendor ID and using extraction ten additional vendor fields can be loaded automatically to populate Docufree indexes.
- **Export Web Services.** Allow you to send index and file data from Docufree. This is used to update an internal system. For example, when an invoice completes the workflow, the status and

other data can be packaged and sent to an SFTP site where it is picked up by you and pulled into your internal financial system.

- **Registration Web Services.** Create a unique identifier for each Docufree document. This global unique identifier (GUID) can be shared so that your internal systems can access the GUID link to display Docufree documents through our Docuview interface.

## Outsourcing Services

Many businesses find that focusing on strategic goals is more important than being consumed by tactical tasks. With Docufree, you have options to outsource your mail handling, scanning, and indexing of documents. Docufree's expertise and core competency is providing you high quality outsourcing services to resolve your document problems.

- Take advantage of Docufree's state-of-the-art technology for your ongoing scanning needs.
- Redirect all of your documents to us and utilize our specialized staff ongoing for scanning and/or indexing of your documents.

## Optional Services

There are several optional additional services.

- **Storage.** You can utilize our on-demand storage solution for continual access to your documents. Docufree provides Document Management features to capture, manage, share, and store your documents.
- **Office Services.** We can provide on-site management of your mailroom and/or copy center which utilizes our specialized technology and reduces your costs.

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