



Work Like Tomorrow.™

5 Case Studies That Reveal Tangible Benefits From Document Workflow Automation Strategies

How to maximize security, ensure compliance and drive efficiencies and productivity with intelligent capture, print and output management, and mobile workflow automation.

KOFAX

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Introduction

Leading organizations use digital workflow automation to transform their multi-function devices (MFDs) into advanced machines that intelligently capture and process information from both physical and digital documents. In fact, MFDs are often the starting point for automation in many companies, disseminating data to other enterprise systems like CRMs and ERPs.

If your enterprise relies on MFDs with document-heavy, manual processes that are redundant and error prone and you face significant security challenges, Kofax ControlSuite™ can help.

Read five case studies to learn how ControlSuite

- Simplifies and enables central management and governance of content flowing through MFP fleets, mobile and desktop devices, business applications, email and print streams.
- Actively manages and secures virtually every aspect of the capture and distribution of documents across any combination of hybrid systems, technologies and devices.
- Reduces error-prone manual tasks, enriches the quality of information and improves accuracy, drives productivity, while maximizing security and ensuring compliance.

**Discover how the power of ControlSuite helps you
Work Like Tomorrow—today.**





Boston Children's Hospital Improves Patient Care through Workflow Automation

Boston Children's Hospital knows that effective collaboration between departments plays an important role in the delivery of high-quality care experiences. To shape a more efficient working environment for its clinicians and staff, the hospital has replaced paper records with digital documents using Kofax ControlSuite™—boosting productivity and enabling multi-million-dollar cost-savings..

Challenge

With malpractice lawsuits and questionable care becoming all too common in the headlines over the past few years, Boston Children's Hospital decided to take initiatives to improve patient care.

There were thousands of paper-based patient records in numerous departments, with some dating back as far as the mid-1960s. These files were not only very difficult to locate and navigate, but they also took up a great deal of physical space in each department. In many cases, entire rooms were being used to store paper files.

Furthermore, physical records meant sharing vital patient information within departments requires significant and time-consuming manual effort. Arranging for the transfer of important paper records often required several back-and-forth conversations by email or phone—making it difficult to move time-sensitive records in a timely manner.

To improve efficiency and drive time- and cost-savings, the hospital decided to implement a digital



“The beauty of the Kofax solution is the ease of use making our process seamless and extremely efficient.”

Alex Khayat, Manager of Architecture, Standards and Emerging Technologies,
Boston Children's Hospital

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About Boston Children's Hospital

Boston Children's Hospital is a 347-bed comprehensive center for pediatric healthcare. As one of the largest pediatric medical centers in the United States, Boston Children's offers a complete range of healthcare services for children from birth through 21 years of age. The hospital records approximately 18,000 inpatient admissions each year, more than 150 outpatient programs, and emergency services care for more than 300,000 patients annually.

Products

Kofax ControlSuite™ (AutoStore)

Focus

Document capture, electronic medical records, collaboration

infrastructure that would connect all departments and replace cumbersome paper-based patient files.

To achieve its goals, Boston Children's Hospital set out to deploy a single, hospital wide solution that would reduce the time and cost of records-processing and facilitate the timely and secure sharing of records between all departments. The aim was to provide each department with a common approach to records-sharing that would improve collaboration, shorten the learning curve, simplify IT administration, and create a shared culture throughout the hospital.

Solution

Like any hospital, Boston Children's Hospital has standard workflows for collaboration that enable its departments to work together effectively to deliver high-quality care. To minimize the potential disruption of the digitation initiative, the hospital was keen to preserve these existing ways of working. The aim was to find a solution that could support and streamline inter-departmental collaboration: centralizing patient

data and helping staff to work efficiently and more productively.

Cost was also an important consideration for Boston Children's Hospital. To reduce the need for significant up-front capital investment, the organization targeted a solution that was compatible with its existing IT infrastructure, based on Hewlett Packard Enterprise (HPE) servers and HP multifunction peripherals (MFPs).

Users were already comfortable with the "scan to email" functionality on HP MFPs, and any solution would have to be capable of integrating seamlessly with this workflow. As a result, Boston Children's Hospital ruled out any solutions that involved external devices with separate scanners, keyboards and storage.

To help Boston Children's Hospital achieve its goals, Kofax developed a custom solution using AutoStore software and the existing HP MFP devices. Today, the hospital uses a central, digital platform to capture and share records.

Results

With help from Kofax, Boston Children's Hospital achieved a smooth transition to the digital records platform. With a central way to manage all record and data capture activities across the organization, AutoStore has helped Boston Children's Hospital shape a simpler and more efficient working environment for its staff.

By offering a streamlined approach to collaboration, the hospital is making it easier for its staff to share time-sensitive patient records quickly across different departments and teams. Because the AutoStore solution preserves a full audit trail of every transaction, Boston Children's Hospital also benefits from increased information security and improved regulatory compliance.

The AutoStore solution is delivering significant operational cost-savings for Boston Children's Hospital. In the past, each department could spend as much as \$125,000 per year on physical storage for paper records. By moving to digital records and avoiding these costs, the hospital will save an estimated \$2 million per year. As more of its departments convert to digital records, return on investment will increase by up to 10 percent per year.

Cegeka Streamlines Data-Center Visits with a Digital Workflow from Kofax

Every month, around 150 people visit Cegeka's data centers across Europe. To avoid the cost, complexity and business risk of managing its visitor sign-in process using paper forms, the company deployed a digital workflow supported by Kofax ControlSuite and Kofax Business Connect. Today, the company saves hours of manual work for its data-center employees, enabling them to focus on critical management tasks.

Challenge

The IT industry knows all too well the ramifications of inefficiency and lax security. For European IT provider Cegeka, which runs three data centers in Europe, tracking and monitoring visitors is critical.

In the past, the company used a paper sign-in system and stored paper logs of who had been in its data centers, the reason for the visit, and a copy of an identification document.

The time-consuming process for signing in visitors and retrieving visitor logs diverted time from data center operations, as employees processed 150 visits per month. As well as requiring significant amounts of manual work, Cegeka's paper-based approach increased the risk of logs being misfiled or misplaced.

To solve the challenge, Cegeka's Shared Technology and Infrastructure Delivery (STAID) organization targeted a digital solution to keep track of data-center visits.

The company aimed to find a cost-effective document capture and workflow automation platform that was easy to use and develop. Integration was also an important requirement, and Cegeka wanted a solution that could connect with the suite of web services it used to support its data-center operations.



“Kofax ControlSuite is helping us to achieve our goal of becoming paperless. At the same time, the solutions have streamlined our operations, making us all more efficient and productive.”

Christophe Briers, Data Center Manager,
Cegeka

About Cegeka

Cegeka is a leading European IT solutions provider. The company specializes in multi-cloud services, cloud orchestration, managed services and optimization of applications, infrastructure and business processes, and takes care of the development and integration of applications, ecosystems and platforms. The group employs nearly 5,000 people across Europe, and in 2018 achieved a turnover of €512 million.

Products

Kofax ControlSuite (AutoStore)
Kofax Business Connect

Focus

Document Capture, Workflow Automation,
Enterprise Mobility

Solution

Cegeka turned to its trusted multi-function printer (MFP) provider for recommendations. Cegeka’s MFP provider recommended two solutions from Kofax to meet its needs: Kofax AutoStore and Kofax Business Connect.

Kofax AutoStore captures and delivers paper and electronic documents to the appropriate business application, while Kofax Business Connect provides the ability to capture and submit documents through mobile devices.

The combination of the two solutions allows Cegeka’s visitors to complete an online form ahead of their data-center visit. The solution creates a record, and when the visitor arrives at the data center, an employee adds a photo of the visitor’s identification document. When the visitor is ready to check out, they simply record the end of their visit via the same online form. Finally, the Kofax solution converts the record into a PDF and sends it to a database for storage.

Results

The combination of Kofax AutoStore and Business Connect has helped Cegeka eliminate multiple steps in the visitor sign-in process.

Before it deployed the Kofax solutions, Cegeka employees spent several hours each month processing data-center visits. By automating the visitor registration process, Cegeka has freed its employees to focus on day-to-day data center management. Additionally, Cegeka no longer needs to print and file 15 double-sided sign-in sheets each day. The entire process is now digitized, simple and efficient.

Cegeka saw reduced costs from implementing the products right out of the box. The company immediately saved money on paper, toner and the storage of paper logs. Employee productivity improved, along with security and compliance, as the solution removes the risk of misfiling or misplacing paper logs and related documents.

Capturing documents with Kofax Business Connect has also boosted the productivity of the company’s mobile workforce significantly. Christophe Briers, Data Center Manager at Cegeka, comments: “Kofax AutoStore is helping us to achieve our goal of becoming paperless. At the same time, the solutions have streamlined our operations, making us all more efficient and productive.”

Cegeka also benefits from hosting Kofax AutoStore and Business Connect on-premises. The company’s own employees manage the solution, and find it simple to administer and use. Because the Kofax solutions integrate with Cegeka’s other digital tools via web services, the company is realizing its cost-efficiency goals.

For Cegeka, Kofax provides the ideal technology stack to support its mobile workforce and drive its visitor registration process. The company saves time and money—enabling it to better serve its customers and keep its data centers protected.

Cottyn Slashes Time to Organize Documents with Kofax ControlSuite

To maximize efficiency in client service, law firms need to automate as many manual processes as feasible. Brussels-based firm Cottyn turned to Kofax to automate the scanning and entry of client documents into its CRM system..

Challenge


In the legal field, time is money. If your attorneys and support staff spend too much time scanning documents, then routing them into document management or customer relationship management (CRM) systems, that's time you can't get back to solve client problems.

Brussels-based law firm Cottyn understands the importance of automating processes like document scanning and storage. For several years, the firm relied on a system built by its former multi-function printer (MFP) provider to scan documents into its systems. However, the MFP provider could not integrate its own software with Cottyn's CRM, requiring support staff to manually link documents into the CRM system. Cottyn turned to its MFP provider to find a solution that could integrate with its CRM system and improve productivity.

Solution

When Cottyn explained its needs, the MFP provider immediately suggested using Kofax Autostore. Unknown to the company, its prior MFP provider had licensed a version of Kofax Autostore to use with its MFPs. However, the MFP provider's expertise ended at providing its white label version of Kofax Autostore; it



 "Kofax ControlSuite takes much less time to scan documents and enables us to work more efficiently."

Thierry Hermans, Partner,
Cottyn

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About Cottyn

Cottyn is an independent law firm with many years of expertise and extensive know-how in various parts of the law. The firm provides a complete business service to companies, governments, financial institutions and private individuals, across language and national borders.

Products

Kofax Insight™
Kofax Mobile Capture™
Kofax SignDoc®

Focus

Automating Purchase-to-Pay Processing

could not integrate systems like the one Cottyn uses to manage documents.

The firm considered two options: moving to new MFPs and adopting Autostore directly, or trying to find a software developer who could create an integration between the MFPs and the CRM system from scratch. Since Kofax offered a viable alternative to developing new software, Cottyn chose to upgrade its MFPs and become a direct customer of Kofax, adopting Kofax ControlSuite (AutoStore and Output Manager) to manage its scanning and printing, respectively. The firm went live with Kofax products in February 2018, with minimal impact to operations.

Transitioning to Kofax Autostore proved to be smooth for Cottyn; because the interface on the firm's former MFPs had been so similar, using Kofax Autostore felt familiar to the users. The firm immediately began using the product to scan documents and route them to specific files. Each scan is then linked to a task in the

CRM system, which then generates an email to the attorneys and staff responsible for the file.

For example, a support staff member will scan in a document provided by the client. Kofax Autostore automatically routes the document to the correct file in the CRM system, and the attorneys working on the file receive an email that the document is available and ready to be reviewed or acted upon. This not only populates the CRM system with documents and routes them appropriately but also creates accountability for the documents.

"We found it easy to start using Kofax products," said Thierry Hermans, Partner at Cottyn. "Everything goes where it's supposed to go, and we can focus on more client work."

Results

Prior to the deployment of Kofax Autostore, the scanning process was a menial, time-consuming task. The Kofax solution has significantly reduced the time required; Hermans estimates that it now takes about half as long as before to scan and manually route documents to the appropriate file in the CRM system.

One unexpected benefit arises from how easy it is to use Kofax Autostore and how quickly it scans and routes documents. As a result, staff members are much more likely to scan documents. Not only does this ensure all relevant client documents are accessible in the CRM system, but it also means that attorneys and staff members work more efficiently on files because there is much less time spent searching for paper documents.

For organizations that want to simplify scanning and routing documents, Hermans said, "I would advise them to do the same: adopt Kofax ControlSuite (AutoStore and Output Manager)."

Northwood Health Systems Automates Patient Workflows to Enhance Care

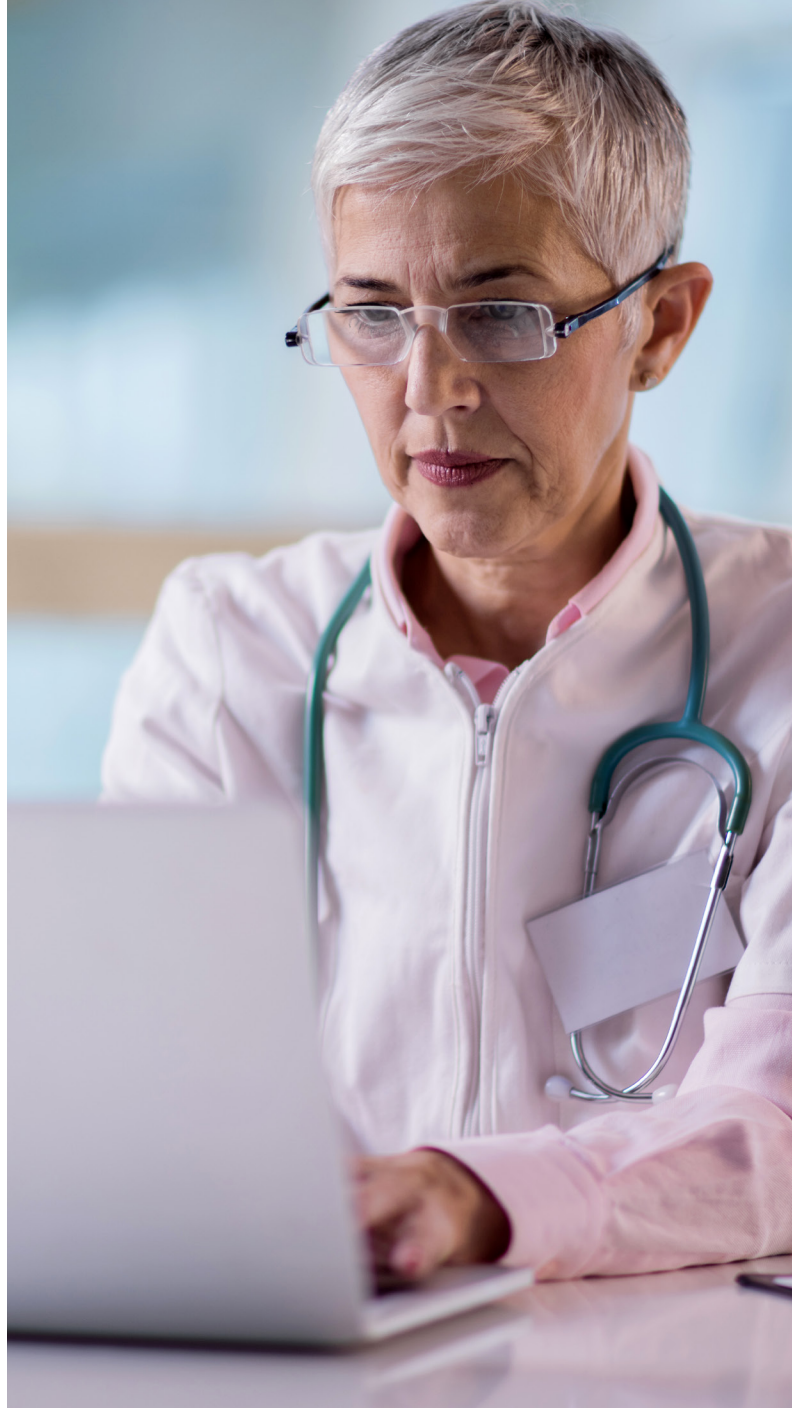
Focused on integrating solid business principles with sound clinical practices, Northwood embarked on an IT strategy to streamline its administrative functions and to integrate clinical records into one harmonious system using Kofax ControlSuite and Microsoft SharePoint.

Challenge

Like all healthcare facilities, Northwood has faced many challenges in recent years with increased regulatory requirements, an expanding patient load due to the Affordable Care Act, changes to billing and operational processes, and requirements for electronic health record (EHR) technology to achieve Meaningful Use qualification from the Department of Health and Human Services.

To address these new imperatives, the Northwood IT department first deployed a robust Microsoft SharePoint content management system, which stores all medical patient information and other business documents related to day-to-day operations. While the SharePoint solution was perfect for content management and retrieval, it lacked an enterprise capture and input solution.

The Northwood IT group was also dealing with a variety of disparate tools to load paper and electronic documents into SharePoint. The pressure was on to find a more efficient approach to data capture and retrieval.



“Northwood prides itself on the high level of service and patient care we bring to our communities,” adds Dzmura. “With this advanced system, we are definitely supporting that mission at all levels.”

Tom Dzmura, IT Director,
Northwood

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About Northwood Health Systems

Cradled in the Ohio River Valley, Wheeling West Virginia is home to Northwood Health Systems, a leader in providing quality care for patients of all ages with emotional problems, intellectual disabilities, mental illness, and drug and alcohol addictions. Privately held, Northwood has more than 500 employees and serves 3,000 patients at more than 19 clinical and residential facilities located across three counties in northern West Virginia.

Products

Kofax ControlSuite (AutoStore)

Focus

Document capture, electronic health records

Solution

Northwood IT Director, Tom Dzmura, was charged with tackling the challenge. After determining the required outcomes to the mission, he selected Kofax AutoStore, an enterprise capture solution which securely integrates Northwood's various input sources—including paper documents and digital files—and provides a unified platform for the clinical and business workflows that support Northwood's mission.

The first phase of the implementation introduced Kofax AutoStore into Northwood's business processes. "We retrofitted the existing Accounts Payable and Human Resources SharePoint libraries first," says Dzmura. "We knew that the medical records project was going to be a huge effort, as there were more than 3.9 million papers in our previous ECM system. We then transitioned our clinical records into the new system."

Northwood processes an average of 500,000 documents per year. With support from Kofax, the organization designed a system that intelligently

identifies, processes and securely routes documents into SharePoint.

"On average, we handle more than 10,000 documents per week, which are submitted in all sorts of ways," Dzmura adds. "Documents are captured either in batches or individually, each with a unique barcode or a standard optical character recognition [OCR] header on one or more pages. Then they are processed, sorted and split as necessary by the Kofax Solution."

The inbound documents processed by Kofax AutoStore originate from a mixed-fleet of 50 multifunction peripherals (MFPs), web apps, Microsoft InfoPath, or a host of other electronic workflows. The Kofax solutions support more than 25 workflows for document scanning and electronic inflow. These processes automatically organize patient information, including Medical Necessity Assessments (MNAs), Treatment Plans, Progress Notes and more, from referral sources, lab work, RX and other providers, as well as administrative systems such as Accounts Payable and Human Resources.



Williams Roberts Lawyers Enhances Visibility and Control of Costs with Kofax

Disbursement costs are a significant component of legal billings, and tracking them accurately is crucial for firms like Williams Roberts Lawyers to maintain healthy margins. To deliver fine-grained visibility into the true cost of serving its clients, the firm uses Fuji Xerox multifunction printers with a cost recovery solution based on Kofax ControlSuite.

Challenge

As part of William Roberts Lawyers' commitment to transparency and cost certainty, it provides large institutional clients with fixed fee or event-based billing that incorporates client disbursement costs such as photocopying, printing, faxing and scanning. In the past, William Roberts Lawyers typically billed its smaller clients on an hourly rate, and absorbed any out-of-pocket expenses itself.

Tony Cavar, Finance Manager at William Roberts Lawyers, explains, "Initially, our approach to recouping disbursement costs for clients worked well, but as the firm grew we realized that our costs were growing rapidly, too.

"Because we had no reliable way to calculate how much we were spending on disbursement, we had to rely on conservative cost estimates. As a result, we were confident that we were undercharging our clients for the disbursement work we were doing."

The lack of cost recovery capabilities also created other challenges for William Roberts Lawyers. Without the ability to record and report on the types of activities performed on each client's behalf, it was difficult to identify valuable opportunities for operational cost-savings.

"We knew there was a degree of wastage in the organization—printing some documents in color when they could be printed in black and white, for example," continues Tony Cavar. "Without a way to drill down into our spend data, we were unable to see the extent of these costs and decide whether we needed to change our policies to reduce them."



"I can't praise the Kofax solution enough. Kofax ControlSuite has delivered far more than we expected, and the proactive nature and professional support we've received from Kofax is commendable."

Tony Cavar, Finance Manager,
William Roberts Lawyers

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About William Roberts Lawyers

William Roberts Lawyers is a mid-sized legal firm headquartered in Sydney, Australia. With additional offices in Melbourne, Brisbane and Singapore, William Roberts Lawyers provides legal services in dispute resolution, litigation, and personal, commercial and property transactions.

Products

Kofax ControlSuite (Equitrac)
Kofax eCopy

Focus

Cost recovery, automatic client disbursement
cost allocation

With the firm's multi-function printer (MFP) contract due for renewal, William Roberts Lawyers decided to investigate its MFP options and look for a cost recovery solution at the same time.

"We targeted a solution that would allow us to calculate and recoup client costs—enabling us to maintain control and transparency in our approach to billing," Tony Cavar comments. "The aim was to continue to offer fixed billing for institutional clients, while enhancing our ability to calculate fair and accurate disbursement fees for smaller clients."

Solution

To gain deliver the new capabilities, William Roberts Lawyers selected an MFP platform from Fuji Xerox and a cost recovery solution based on Kofax Equitrac.

Kofax Equitrac allows firms, regardless of size, to effectively track all essential client service activities including printing, scanning, faxing and copying. The solution also tracks landline phone, postage, courier and research charges. Easy to deploy, Kofax Equitrac works within a firm's existing print and IT infrastructure, and seamlessly with popular practice management systems. Powerful and smart, Kofax Equitrac also provides detailed, meaningful reports so that firms can make informed decisions about costs, resources and productivity.

"After five weeks of testing both the Fuji Xerox equipment and the Kofax Equitrac cost recovery solution, we knew we'd found the solution we needed," recalls Tony Cavar. "We were confident that the

investment we were about to make was more than viable."

Working together with teams from Fuji Xerox and Kofax, William Roberts Lawyers deployed the new MFP and cost recovery solutions.

"Kofax Equitrac is very user-friendly and intuitive, so we required very little training to get started," adds Tony Cavar.

Results

Today, William Roberts Lawyers can easily and accurately capture, record and recoup expenses on client matters.

"Thanks to the accuracy that Kofax Equitrac provides us, we can now offer clients realistic fixed fees and bill with peace of mind," says Tony Cavar. "The Kofax solution is rock solid and 100 percent reliable. Crucially, we can now ensure that costs don't exceed our revenue."

With detailed reports from Kofax Equitrac, William Roberts Lawyers has the visibility it needs to identify where improvements can be made to reduce its environmental footprint and minimize costs for the firm and its clients.

The security capabilities of Kofax Equitrac have been a welcome benefit for William Roberts Lawyers. Tony Cavar comments: "Although information security was not one of our main selection criteria for the new solution, it is certainly advantageous. Because our employees must punch in an access code to activate an MFP, our documents are well-protected and the potential for paper and toner wastage is minimized."

Since its initial deployment, William Roberts Lawyers has extended its Kofax solution by integrating the platform with Kofax eCopy—a secure document capture solution.

"We have used Kofax eCopy Scan to automate our billing process, which has saved us time and money," Tony Cavar explains. "We are now looking into integrating Kofax Equitrac with our Lexis Affinity practice management solution to further streamline our tracking of client services."

Tony Cavar concludes: "I can't praise the Kofax solution enough. Kofax Equitrac has delivered far more than we expected, and the proactive nature and professional support we've received from Kofax is commendable."

Next Steps

Experience the world's most complete end-to-end workflow automation solution.

For more information on **Kofax Workflow Automation** or to request a demo, contact us at info@kofax.com or give us a call at: **+1 949.783.1333**

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