



*Work Like Tomorrow.™*

## Preparing for the Future of Work

Using Intelligent Automation to Work Like Tomorrow

**KOFAX**



## Introduction

The business world is ever-changing, and automated processes now handle yesterday's essential skills. As technology advances, this trend continues, which suggests that the skills you and your employees have today will no longer be crucial in tomorrow's more-automated workplace. There are countless examples of businesses that take advantage of new technologies to remain competitive in the market; hence, entrepreneurs need access to the most advanced ways to automate their workflows.

Kofax has developed several programs that allow entrepreneurs to put the most advanced automation technology to work. Two of these, **Kofax OmniPage™** and **Kofax Power PDF™**, use advanced digital imaging technologies such as optical character recognition (OCR) to automate significant business workflows.



## Summary

Businesses currently have to use document recording, organizing and processing systems that rely too much on manual effort. As a result, employees are forced to dedicate their precious working hours to overseeing repetitive, low-skill activities. Entrepreneurs are especially pressed for time, as they tend to have less available human resources and a greater need for organizational structure.

Although older software and technologies can improve these processes as compared to physical data storage in filing cabinets, they don't go far enough. As a result, entrepreneurs must limit their businesses' potential so that they can address the burdens of fundamental organization and structural issues. This burden both decreases revenue potential today and creates a significant risk of operational inefficiency dragging the business down as the market landscape changes.



## Identifying Current Problems

Success is more than managing to pay the bills and keep clients satisfied. As entrepreneurs develop workflows to accomplish tasks and remain competitive, we identify several problems that can occur related to document imaging and archiving:

- ◆ There are challenges to digitizing documents in **bulk** that waste time.
- ◆ Employees must **manually review** scanned documents to control scan quality.
- ◆ Documents must be **organized** in an intelligent **structure**.
- ◆ It **takes time** to convert and edit PDF documents.
- ◆ Combining and splitting PDFs is **error-prone and time-consuming**.
- ◆ Companies need adequate **protection** against hackers and viruses.
- ◆ Employees need to be able to **collaborate** when producing documents.
- ◆ Businesses require software solutions that **scale** as they grow.

None of these problems is insurmountable, even without advanced technology. However, each of them represents a drain on business resources that are best used elsewhere. The result so far has been businesses that struggle to get off the ground, increasing the chance that an otherwise-brilliant venture collapses due to too much work and too little support. There are alternate solutions that instead empower businesses to more effectively direct their employees and adapt to changing circumstances.



## Analysis

Entrepreneurs in different industries encounter these issues to varying degrees, generally according to how much communication they conduct with clients, suppliers and employees.

### **Need:**

**There are challenges to digitizing documents in bulk that waste time.**

### **Example:**

An entrepreneur has a survey company that solicits feedback on behalf of other companies, such as restaurants and retail establishments. Frequently, these surveys are submitted in physical, multipage documents. When the entrepreneur receives them, these documents arrive in varying qualities, some using color and others using greyscale. Some surveys include highlights, and there are occasionally blank pages included in the packets; other pages are upside down or facing the wrong direction.

### **Solution:**

Effective software can work with any of these issues and still produce high-fidelity scans without any additional delays. The software can even determine if a page is blank or if it was only facing the wrong direction during the scan. Entrepreneurs can use this software to preserve highlights from the original survey and discern between color and black-and-white scans—without separating the documents manually.



**Need:**

Employees must manually review scanned documents to control scan quality.

**Example:**

A company that provides guided tours requires a filled-out and signed application from each participant. Those under 18 years of age must also provide a permission slip from their parents. To remain in compliance with local regulations and potential liability for insurance providers, the company must preserve these documents for at least 90 days. While the company has a shared network drive to store digital copies of these applications, the scanner occasionally fails to scan these documents properly. As a result, employees must manually review the scans and re-scan any blurry, obscured or improperly cropped document.

**Solution:**

Software that incorporates high-quality error correction can eliminate the need for the second look from employees. Such software can appropriately crop and orient documents, as well as sharpen blurred areas. It can also correct cosmetic errors and ensure that minor details on the physical applications show up correctly on the scanned copy.



**Need:**

**Documents must be organized in an intelligent structure.**

**Example:**

The same tour company needs to organize applications according to the event date, location and attendee. As a result, the owner tasks staff with manually tagging documents with the relevant data and then creating folders to store them based on date and event kind. This process makes it easy to find the correct document when needed, but is exceptionally labor-intensive. It is further complicated by the need for this organizational structure to be accessible from any computer on the network, meaning the documents must be manually uploaded to the shared drive.

**Solution:**

Instead of manually tagging and organizing these documents, intelligent automation can apply the tags and create the folders on the shared drive as needed. Advanced software uses the latest OCR to discern relevant fields in the documents and populates the tags according to the attendee, event and date. Further, it creates the scanned document in the appropriate folder to ensure that the records are easy to find when needed. The software integrates with Microsoft SharePoint to store these documents in a location that's even accessible to computers that access the shared drive remotely.



**Need:**

**It takes time to convert and edit PDF documents.**

**Example:**

An entrepreneur offers a service providing and analyzing psychological profiles based on a complicated test. The test involves a mix of written responses, multiple-choice answer selections and drawn images. After the subject completes the test, the entrepreneur has a staff member go through the test and transcribe the information into an easily searchable text document, and separately scan and crop the images while typing a description for reference.

**Solution:**

Rather than relying on the employee's accuracy and using their time for transcription, scanning and cropping, the documents can be scanned in their entirety. Advanced software can then convert the PDF into a text document to simplify searching and editing on other terminals, while retaining the image in the same document; this removes the need to store it as a separate image file.

**Need:**

**Combining and splitting PDFs is error-prone and time-consuming.**

**Example:**

Every quarter, an entrepreneur needs to provide a status update to the investors who are backing the company. Several employees need to provide an accounting of their progress on several projects for current clients and the steps taken toward marketing to new clients. Additionally, the entrepreneur's bookkeeper provides P&L reports that require inclusion in the update. Combining all of this information is difficult and cannot be delegated, as much of the data is sensitive.

**Solution:**

With a few clicks, an advanced PDF editor can combine these documents into a useful report, regardless of how the information is initially submitted. It can take the .doc, .xls, and PDF files and combine them into a master document in any order desired. The entrepreneur can even add bookmarks and a table of contents to make it easier for the investors to find the information that matters most to them.

**Need:**

Companies need adequate protection against hackers and viruses.

**Example:**

Undesirable actors have long identified PDF files as a vector to insert viruses into corporate networks. Unfortunately, entrepreneurs are just as vulnerable to such attacks, even if they aren't the intended targets. Opening a PDF in a typical reader such as Adobe Acrobat contains an element of risk; the PDF may contain exploitative code that compromises a small business's networked computers.

**Solution:**

The best PDF readers and editors have built-in protection against these kinds of attacks. Rather than only running an executable file nested in a PDF, a high-quality reader will scan the document first and prevent the malicious code from running. As a result, the business's network is protected, regardless of how familiar the employees are with safe computer behavior.





**Need:**

**Employees need to be able to collaborate when producing documents.**

**Example:**

A startup that produces financial processing software for other businesses needs to assemble user manuals so that the companies know how to get the most out of the programs. The program is complex but effective, so the manual must be appropriately detailed. Multiple employees work on the manual, producing instructions according to their respective skillsets. The combination process is complicated, as various employees cannot open the main document simultaneously, leading to several copies being made and confusion regarding which copies have the latest information.

**Solution:**

The company can instead use a robust PDF editor that allows multiple employees to collaborate at the same time. The document shows changes in real time, eliminating instances of numerous copies and ensuring that there is no confusion related to the document containing relevant information.

**Need:**

**Businesses require software solutions that scale as they grow.**

**Example:**

A small business has workable systems that don't overtax employees' time. These involve ways to scan, convert and edit PDFs that are labor-intensive, but take advantage of employees' downtime. Based on high-quality results and a positive reputation in the industry, more clients want to use the business's services, resulting in higher demands on the employees. As the company takes on more clients, the inefficient systems become more of a problem and will force the owner to hire dedicated staff for these administrative tasks to keep up with the workload.

**Solution:**

The best software automates these processes so that the business never needs to hire staff specifically for PDF-related organization. Additionally, as the business expands over the years to the point that it's no longer a small business, there are enterprise editions of the software that can accommodate a company that has dozens or hundreds of employees and multiple locations.



## Looking Ahead

The business world has come a long way in recent decades, and the rate of change is only increasing. Since the 1990s, when businesses began incorporating internet connectivity in earnest, the specific tasks that workers were responsible for have changed dramatically. Compared to today, however, the digital workplace of the early 2000s still required many manual processes to complete tasks. Email, scanning, data storage and data analysis all required individual completion.

There are already significant opportunities to save time and effort in the workplace through automation. While industrial processes have seen a near-complete transition to robotic workforces as a form of automated production, white-collar workplaces are about to undergo similar changes. Increasingly, office workers have transitioned to overseeing automated processes related to data systems, communication and analysis. The workplace of tomorrow will continually demand more rapid responses and new skills as current workplace tasks become automated. Businesses must remain on the cutting-edge to stay competitive in tomorrow's offices.





## Designing a Solution That Works

Document imaging and archiving are organizational functions that play a large part in determining how successful a business venture is. As the business grows, it needs systems that continue to provide efficient, reliable results. Success in this regard involves software that is part of an intelligent automation platform. The software uses advanced OCR technology to identify documents and analyze the information that they contain properly, ultimately saving employees time and effort when completing otherwise-repetitive tasks.

Compatibility is another core consideration when designing these programs. The perfect solution is one that seamlessly interacts with software the entrepreneurs are already using—specifically, Microsoft® programs such as Word®, Excel® and PowerPoint®, as well as its web-based platform, SharePoint. Ideally, it is also compatible with Corel® WordPerfect® and HTML code. Beyond the software, businesses use many different scanner models, and the programs must be compatible with each.

Finally, the solution should also provide a way for businesses to meet their needs for a reasonable price. Considering that different companies have unique needs, these programs should be part of a larger platform. Companies should be able to pick and choose which options suit their needs rather than be saddled with an overloaded application that fails to function as a cost-effective solution.



## Justification

**Kofax** has produced several programs designed to meet entrepreneurs' needs. **Kofax Power PDF™** is the premier option for creating, converting and editing PDF files between the useful formats for businesses. It integrates with Windows and the Microsoft Office suite to reduce the learning curve for employees, while increasing accessibility. **OmniPage** gives companies the ability to scan large quantities of documents, while converting and intelligently storing them based on the document contents themselves. Kofax also provides many related products that can help businesses, such as incredibly accurate scanning enhancements from **Kofax VRS Elite®**.

We've organized these solutions in a way that's easy to search. You can find what your business needs based on several major categories: **Intelligent Automation, Robotic Process Automation, Cognitive Capture, Process Orchestration, Advanced Analytics, Mobility and Engagement, AP Automation, and PDF and Document Imaging**. Each is designed to save your employees' time and effort so that you can task them with the vital work that generates revenue for your business. The more processes that you can automate or render more efficient by using these programs, the better prepared your business is to address tomorrow's challenges and keep your clients happy.



## Summary

Businesses in every industry are incorporating more automation in every step of their workflows. While these technologies started as a luxury that the most advanced companies could use to generate a competitive edge, they are becoming more common. It's a truism about technological advances that what starts as a novel convenience and positive innovation rapidly becomes a mandatory conclusion and basic necessity to function in business. Just as you can't imagine a business functioning today without some access to the internet and email, tomorrow's companies are impossible without automated processes.

Let the advanced programs that Kofax has created serve your business as you prepare for what the future will bring. No matter how much your industry changes, we can help improve your organization and workflows so that you can better meet those challenges. Just as what worked yesterday doesn't work for today's needs, the old-fashioned working methods of today won't empower you to

### **Work Like Tomorrow.**

Visit [Kofax.com](https://www.kofax.com) and explore potent document imaging and archiving programs such as **Power PDF** and **OmniPage**. Bring these programs to your business with a free trial and experience the difference first-hand.

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