



Document Management and Workflow Solutions: Why Integration Is Key

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A document management and workflow solution is nothing without its ability to seamlessly integrate with your current tools and applications. If you can't integrate your new document management and workflow solution with your legacy database, how will all the data and information you've stored over the years be useful?

This is a common reason why many businesses hesitate when they begin thinking about implementing a new document management and workflow system for their business. They fear they won't be equipped to integrate all their current tools and applications properly, or that the support they receive won't be enough for them to use the new solution. Luckily, that fear can be easily remedied with the right solution.

Let's talk all things integration and how adding a document management and workflow solution to your processes can simplify your day-to-day and save you time and money.

Types of Integration

Integrating your legacy system into your new DM and WF solution is not a one-size-fits-all project. Depending on your specific needs and the applications you use, you'll most likely fit into these three different types of integrations, each of which has different specifications:

1. **Data-level integrations:** Right at the foundation of your business is your data, and a data-level integration ensures that all of your data across every system can stay consistent and up to date in your new document management and workflow solution.
2. **Purpose-built integrations:** Many widely adopted applications like Microsoft Office or Outlook can be integrated seamlessly with a purpose-built integration, giving your users access to all documents and information between your document management and workflow solution and other applications.
3. **Inter-application integrations:** Depending on whether you need to access your DM and WF solution within your applications, you can use an inter-application integration to access your solutions documents and information directly within the other applications, without skipping a beat.

Additionally, there are management solutions that your business most likely implements that need to be integrated into your DM and WF solution. The three most common are CRM, ERM, and ERP. In order to function properly and at optimal effectiveness, your DM and WF solution must be integrated into whichever management solutions you use. While these solutions do require an established integration to function properly, the right DM and WF solution will have the support and integration capabilities to make sure you're getting the most out of your new solution.

Why You Should Avoid a DIY Integration

The best developers and technologists agree that a DIY integration can be risky. Even a fully staffed IT department has other work it needs to attend to; taking time out of your IT staff's busy schedule to integrate the new DM and WF solution can push back projects and end up costing you more in the end.

The best option is to leave it to the professionals. That is one key aspect of finding your a DM and WF solution that must be done right—finding software that has the best support possible to achieve this integration for you. Because the support team of each individual software company is fully enmeshed within their product, they know how to integrate it best so that you're getting the full benefits of your new solution. With the right integration, you'll have quick and easy access to documents in virtually every system, the power to automate practically every aspect of your business, and efficient management of document-intensive tasks.

When choosing your new solution, it's important to note the different types of industries the business has worked with in the past. You want to choose someone that specializes in these types of projects and has experience carrying them out successfully.

A Real-World Example

To put it into perspective, let's take one of our past clients' integration projects as an example. Heifer International's mission is to work with communities to end world hunger and poverty and care for the Earth. Donations fund their efforts to provide livestock such as cows and goats to needy families. The animals provide families with both food and reliable income, as agricultural products such as milk, eggs, and honey can be traded or sold at market.

Heifer had a labor-intensive paper-based donation processing procedure in place and needed help to move into the digital world. Mindwrap staff worked with Heifer to analyze their business requirements and define a solution using Optix scanning, Optix Workflow, and Optix web that would allow them to process their donations much more efficiently. By scanning checks and other donation documents, they could eliminate the need for photocopying and long-term warehouse storage of the paper. Mindwrap developed a custom batch processing application to scan, index, and create a CSV table of all donations in a batch. The back CSV file is forwarded via FTP to Blackbaud Enterprise CRM (BBEC), which provides cloud-based donor management services. In addition, images of scanned checks in the batch were sent to Financial Transmission Network, Inc. (FTNI) for receivables processing and subsequent deposit to Heifer's bank accounts.

The Optix system provided by Mindwrap streamlined Heifer's donation receivables, and saved both labor and storage expenses.

Each integration project is unique, and we have experience in many different industries and are capable of handling any integration project your business has in order to optimize efficiency and simplify your day-to-day.

Have some questions for us? We're happy to answer them. [Contact us](#) to get answers on integration and document management and workflow solutions.