



# How to Automate Document Capture in Your Business Process

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We know you are looking to increase workplace efficiency and productivity, but it is not always so easy in practice. Fortunately, no matter the size of your business, you do have options. Automating your document capture process is one affordable and organized way to better handle your documents and avoid the tedious process of doing things manually.

With a little guidance and the right technology at your disposal, you can easily automate your business processes. We have put together a few tips to give you a head start on your automation journey.

## Break Down Your Current Document Process

You most likely have various departments and individuals in charge of their own document processes, which certainly makes combining everything quite a challenge. At first, you will want to outline and define your existing processes, and then document them. This can include a variety of things, but you want to make sure you have your HR onboarding processes, contracts, and accounts payable.

Consider these questions as you move along:

- Who is in charge of receiving, analyzing, and approving these documents?
- Which of my departments document and handle each step?
- Is there a specific place where each document is archived?
- How do information and individual documents enter our business?
- Is this system useful? Could it be improved upon?

If you find that a process is not as streamlined or efficient as it should be, you are not alone. Sometimes, it is best to take a step back in order to take a step forward. Breaking down your current document management process helps you find the cracks that need to be filled and to identify what works well for your business.

Document each step that is absolutely necessary, and eliminate any that are not. Make sure you put the right individuals in charge of the right processes, and that they know what exactly they will be

responsible for. We also recommend creating a document management strategy, as it saves you the hassle of needing to determine which types of documents are handled by which departments. Doing so also tells you exactly how to store all documents.

## Streamline Your Document Capture Process

Now it's cleanup time—it may not be very exciting or easy, but it is an important part of the process. As mentioned above, be sure to remove all unnecessary steps and processes that do not add value. Once you have taken care of that, you will need to consider which individuals need to be added to the process and trained accordingly.

Finally, eliminate any duplicate tasks or processes. It is extremely common for communication to lapse between departments, which can lead some employees to inadvertently complete or review duplicate items, or to skip over points altogether that they may have assumed were completed elsewhere.

Compiling a detailed business process will help you eliminate errors in the future by giving your employees a clear, accessible outline of the process and their duties. The last section and this one will help you and your employees better manage the process, and give you visibility into what is important and what can be fixed. As you take this step back and consider the big picture, remember that you are saving yourself countless future man hours that can be better spent elsewhere.

# Choose the Right Workflow and Document Management Technology

With both steps above completed, you are getting closer to implementing a better document management process. But truthfully, the automation part does not even begin without the right technology to handle it. Your ability to automate and improve your workflow and document management processes hinges on having the right system in place.

With the right technology, you will have the ability to create and automate business processes much easier, and have a better way to communicate between employees, applications, and services. The best document management systems allow you to route, review, and approve documents, have point-and-click business rule definition features, and eliminate the likelihood of bottlenecks developing.

The answer is simple: You want to be able to easily manage and automate your processes without difficulty. You want to improve your ROI and lessen the strain on your IT department, and the right workflow and document management software can do just that.

[Contact us](#) today to learn more about choosing the right business process management software for you, and to explore the automation solutions that Optix offers.