

Work Like Tomorrow.™



Essential Tools to Improve Workflow Management

Software solutions for modern businesses

KOFAX



Introduction

Modern businesses face unique challenges in every industry. On the one hand, they must innovate to remain relevant in a continually changing environment. On the other, they must establish effective systems that create operational efficiency and will remain in place for the sake of stability. To balance both concerns, Kofax has developed a software suite that gives businesses the ability to improve document management and workflows dynamically.

This paper serves as an introduction to the powerful tools Kofax has developed for today's businesses. Small businesses can especially benefit through reading the problems outlined within and determining if the software solutions we present are relevant to your needs. Many of the issues are related to document management workflows, which produce excessive delays and complications for businesses.

Consider the following problems, which frequently afflict businesses in a systemic sense:

- Employee disorganization and forgetfulness
- Difficulty with document formats
- Employee collaboration and accessibility
- Client communication methods
- Network and intellectual property security

These are some of the most common areas in which small businesses experience inefficiencies. Specific problems in each of these categories result in wasted managerial time, significant distractions from productive work, lost employee time and potentially lost clients and revenue.

Analysis

The best way to understand how relevant these problems are is to provide a specific example for each one. While the situations are fictionalized, they are based on actual experiences:

Need:

Employees are disorganized and don't have a disciplined document organization procedure.

Example:

A restaurant has performed well, recently expanded to a larger building and hired more managerial staff. The new staff members are assigned tasks related to inventory and recordkeeping, but the company lacks existing methods for them to use. As a result, the employees handwrite inventory on forms made in Excel to create checklists. The checklists are saved in multiple locations on different computers, so when they are updated, the team is unsure of which checklist to use. The inventory numbers are manually entered into the computer and saved in seemingly random locations, wasting time as the owner tracks down the latest numbers.

Solution:

The owner can create a PDF form that has all the standard items on it, then have the managers fill out printed copies. They can then scan the completed forms, convert the scans into Excel spreadsheets, and save the resulting forms in a designated location on a shared drive, organized by the date they were scanned. The checklists can also be stored in a single, accessible location and be updated periodically to eliminate confusion regarding the different versions.



Need:

Documents frequently appear in different formats that are incorrect for the business's needs.

Example:

An HVAC company works with multiple suppliers that mostly provide digital copies of their receipts, a marketing company that sends logo and branding files in image formats, and contractors who draft quotes in Word® and invoices in Excel®. When information is presented to the clients, it must be submitted in PDF format to avoid confusion or editing before a contract is signed. The company's accountant needs receipts in PDF format for consistency's sake, but the company receives receipts in a variety of formats. This results in hours of wasted time, as employees must find workarounds to convert files or retype text files.

Solution:

A powerful PDF editor can work with each of these formats and convert them all to PDF. Similarly, it can take PDFs and convert them into other formats for editing, as needed. In a matter of seconds, employees can use an integrated PDF editor from the same Microsoft® programs that they use to create and edit their original documents. The previously wasted time can then be spent working productively.



**Need:**

Employees are unable to access the files they need for work.

Example:

A pharmaceutical company has a sales department that sends its employees to present at medical offices. While there, the representatives must give presentations to the staff using PowerPoint®, videos and shared documents. As the company is continuously conducting research, these marketing materials are regularly updated, and the representatives must use the latest versions to provide accurate information. The company sends update emails with links to the latest versions of these files, and the representatives must go to the website and download them. If the representative misses the email or opens the older version, they will provide false information to the medical offices.

Solution:

A cloud-based networking solution will allow the representatives to access the latest files without needing to visit a website and download new copies. By eliminating the email step, it is no longer possible for the representative to use an old version. Instead, the representative can use mobile Internet access to open the documents directly from the shared drive, and the marketing team can update the files at any point.

Need:

Communication with clients is inefficient and frustrating.

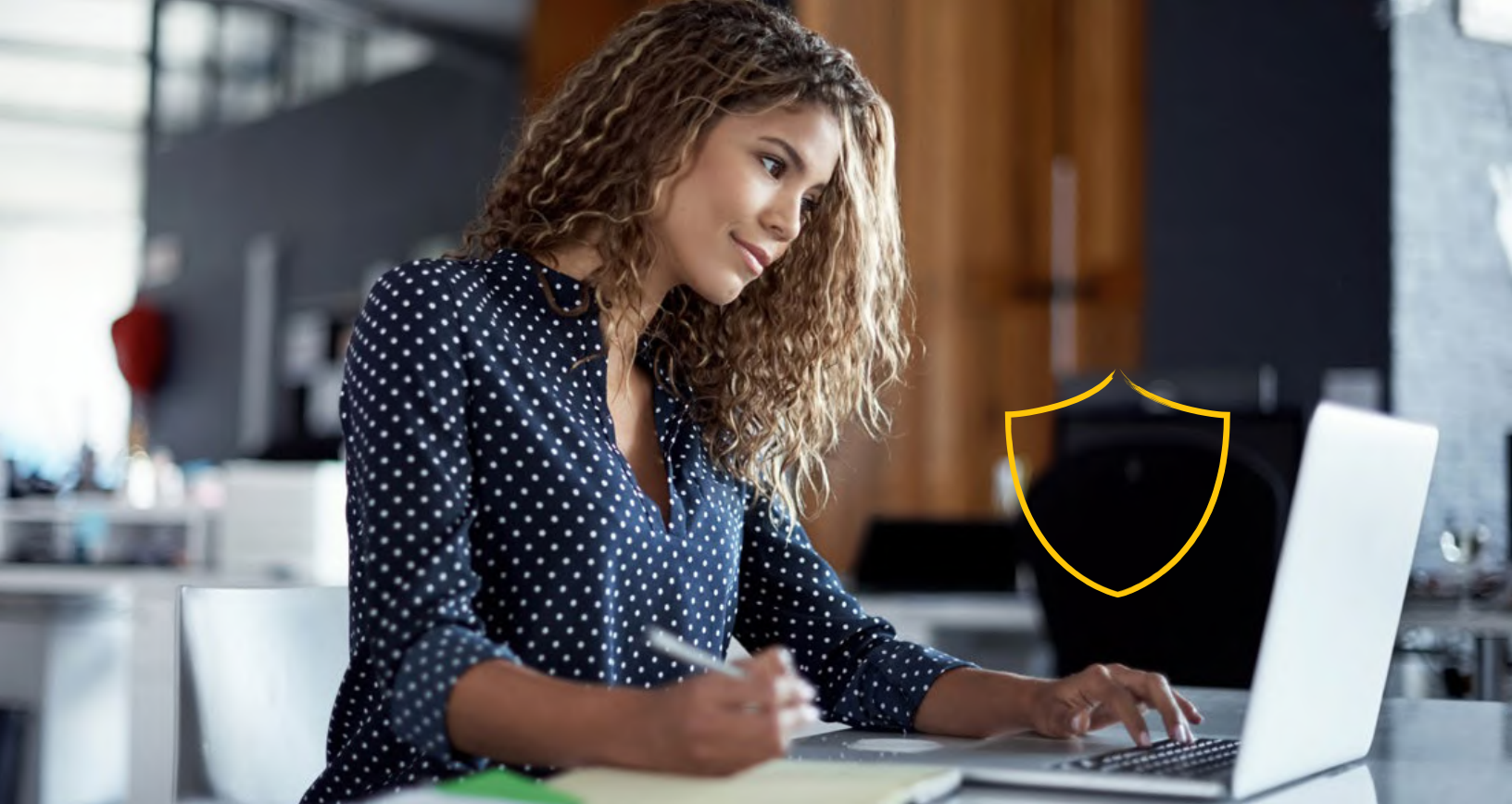
Example:

A marketing firm sends quotes and contracts to its clients and needs them to be signed and returned before beginning work. The clients must print out the documents, physically sign them, and then either mail them back to the marketing firm or scan them and email them. In either case, the client must do extra work, and the firm has lost some clients to a competing firm that has a more streamlined onboarding process.

Solution:

The firm can upgrade to a PDF editor that allows digital signatures. These signatures possess the same authenticity as the previous method, but are much easier for the client to provide. Now, the client will receive an alert that the documents have been sent, sign them using secure authentication and submit them digitally. The firm can begin work more swiftly and has a far more streamlined process to communicate with clients.



**Need:**

The business's files and network are vulnerable to hacking and theft.

Example:

A digital news outlet works with a field team that is located across several regions. These researchers and reporters submit their articles and information via email, sending it to a central editor who reviews the articles and compiles the information into the online publication. One of the reporter's computers is hacked, and it sends a phishing email to the contacts associated with the news outlet. A few employees open the email and their computers are also compromised. Hackers now have access to the news outlet's private, internal information.

Solution:

The outlet can transition to a cloud system such as Microsoft SharePoint. The researchers and reporters can submit the documents directly to the shared drive and eliminate the need for risky email communication with attachments. The editor can open the files with a robust PDF editor that resists malicious code embedded in files, so even if one of the reporter's computers is compromised, the hacking attempt proceeds no further.



Historical Overview

Businesses have been incorporating an increasing number of computer-based workflows since the 1980s. In the 1990s and 2000s, they began incorporating internet accessibility and communication. This past decade has seen a dramatic increase in employee connectivity and the ability for businesses to work digitally from multiple locations. Kofax has continued these trends with programs like **Kofax Power PDF™** that simultaneously simplify work processes, improve communication and add another layer of security.



Designing a Solution That Works

We've considered the problems that businesses face today and created programs that provide effective solutions. When designing Power PDF, we needed it to perform the following functions:

- Allow **multiple users** to access and update the same files at the same time.
- **Integrate** with Microsoft Office® and SharePoint for maximum accessibility.
- **Convert** documents between PDF, Word, Excel, PowerPoint and JPG.
- **Cooperate** with Microsoft Azure and Active Directory for industry-leading security.
- **Create** fillable forms that authenticate digital signatures.
- **Seamlessly** merge and split PDFs on command.

Our team fulfilled these requests and included additional features that add even more flexibility to the program. The result is a piece of software that can help businesses improve their workflows to remain competitive in the modern market.



Final Thoughts

Power PDF is an excellent tool for small business owners who want to prepare their businesses for growth while improving their current operations. This program integrates with your current system and empowers you to make substantial improvements. The results are more straightforward tasks for your employees, greater customer satisfaction and reduced costs as you automate more of your organizational structure. Regardless of your industry, the trends are clear that accessibility will remain one of the most critical business needs.

Kofax provides exceptional support related to Power PDF after purchase. You have the opportunity to [sign up for a free 15-day trial](#) to experience the program for yourself. Once you see the positive impact it will have on your business, you can speak with our team to learn more, or purchase either the Standard or Advanced editions. The best thing you can do for your business today is to get the tools you need to **Work Like Tomorrow.**



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