

Xerox and NSi AutoStore Workflow

Intelligent Capture and Business Automation



Customer

Solid Entreprenør AS main priority is construction and rehabilitation of apartment-complex as well as public buildings. Solid Project AS is a property developer. Solid Eiendom AS owns the corporate office- and storage-buildings. Solid Gruppen AS is a company in constant growth, where the most important resource is the employee.



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Challenge

The documentation process of Solid's work is very extensive: Every project in the construction industry of Norway has to be precisely documented with the help of specified lists to insure quality management. These lists are created beforehand in the company headquarter of Solid with a special application and every list can be identified with a unique ID-number created by the program. This ID-number is also found in the company's ERP-system and identifies the individual project. The lists fulfill the purpose of documenting and check-marking the processes around a project. A printed version is taken to the house, flat or building which has to be documented. The employee then does his job and goes through the list. Once it is completed, the document is taken back to the company. This highly important information has to be archived and made available for everyone within the company. The list was scanned on a multi-functional peripheral and sent to the employee's desktop PC. The received PDF document had to be renamed manually and then sent to SharePoint 2007. This process was very time consuming and error prone: Although the company set up a guideline on entering the captured data, the individual employee named the captured files in a way which only made sense to him or herself. This resulted in a time consuming retrieval of archived data.

Solution

Solid was looking for a workflow solution which reduced the manual steps in this business workflow. The files needed to be named in a consistent manner, controlled by the workflow software. Files needed to be saved with a set of meta-data tags in order to simplify the retrieval of archived documents. Furthermore the captured files needed to be converted to a searchable PDF, without having the user converting them manually in a separate process after capturing. Finally, the solution needed to have a direct connection from the capture source MFP to the target application SharePoint 2007. The required lists for documenting and evaluating Solid's work are created by the special application with a unique ID-number for each list. The application writes this number into the entry of the project in the SQL-based database of the company, so that the ID-number of the list can be matched to the relevant project. As soon as the finished project is evaluated and the proper list for it is filled out accordingly, it is taken back to the company in order to be archived. The employee captures the lists in a single batch: He selects the AutoStore menu button on the MFP panel and confirms the capture process with the "Scan-button". The manual process ends for the employee at this stage. The MFP scans the lists and forwards the scanned images to the AutoStore server. AutoStore reads out the unique list ID-number which was provided beforehand when creating the lists. The zonal OCR reads the ID-numbers and AutoStore validates these by looking up the data in the SQL-database. Parallel to this lookup, the ERP system provides AutoStore with a set of meta-data for the filename. AutoStore converts the captured image to a searchable PDF, renames the file with the data taken from the ERP system, tags the file with the metadata from the ERP system and finally routes the document seamlessly to the company's info portal SharePoint 2007.

Benefits

Documents can now be retrieved by every employee within the company. Searchable PDFs allow a full text search to easily find the required documents, instead of just searching for the document name. AutoStore routes the documents directly from the MFP to SharePoint 2007, saves them in a consistent manner in a pre-defined structure every employee is familiar with.

