



# DOCUMENT MANAGEMENT AND APPROVAL WORKFLOW AUTOMATION

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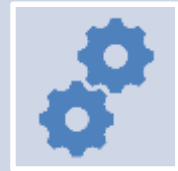
# INTRODUCTION



Efficient document management and approval workflows are crucial for productivity and compliance.



Manual processes cause delays, errors, and compliance issues, hindering efficiency.



Automated solutions are increasingly necessary for competitiveness and efficiency.



Automation streamlines document management, driving productivity, accuracy, and compliance.



Transitioning from manual to automated systems overcomes limitations.



Implementing an Electronic Document Management System (EDMS) with automated workflows and electronic signatures is key.

# OVERVIEW

## Introduction to Document Management

Document management entails storing, organizing, and tracking documents to ensure data integrity, security, and compliance.

## Traditional Manual Process and Challenges

Manual routing and processing cause delays and lack of visibility. It increases risk of errors, discrepancies, and compliance issues due to inconsistent approval processes.

## The Approval Workflow Process

Documents follow a set sequence of steps, routing between stakeholders or departments until approved or rejected.

## Bottlenecks and Challenges

Approval delays can result from manual routing, limited visibility, and increased error risk, potentially leading to compliance issues from inconsistent processes.

# CURRENT PROCESS

## Manual Routing of Paper Documents

Manual routing of paper documents slows down approval processes, leading to inefficiencies and delays.

## Traditional Manual Process and Challenges

Tracking document status via email results in cluttered inboxes and difficulty in locating the latest version, risking stakeholders missing critical updates

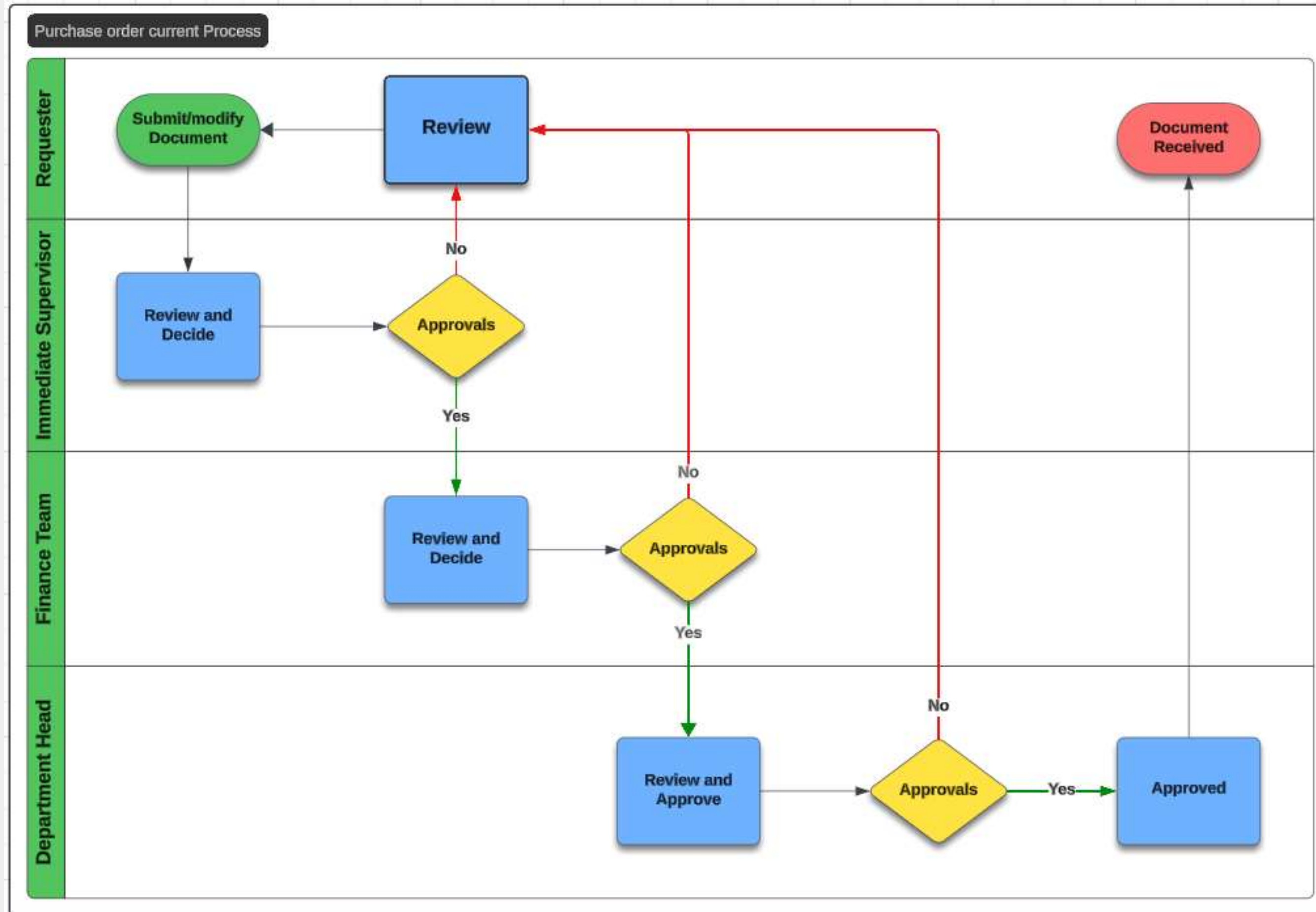
## Physical Signatures Required for Approvals

Obtaining physical signatures adds complexity and time to approvals, especially when multiple stakeholders are involved

## Limited Version Control

Limited version control with paper documents causes confusion and increases the likelihood of outdated versions being used, leading to rework and delays.

# SWIMLANE AS IS



# CHALLENGES

## Manual Data Entry

Many companies still used the manual method to enter the information into documents. This often leads to errors as there can be errors in this process, which makes the process inaccurate.

## Error-Prone Procedure

The approval procedure currently is challenging and is prone to errors as its manual. It is possible for requesters or approvers to complete forms incorrectly or forget to sign them entirely.

## Inconsistent Document Formats

Currently, the documents are created and uploaded in different formats Word documents, PDFs, and spreadsheets. Different document formats cause problems for document management systems, as it makes it harder to handle and review papers.

## Lack of Accessibility

Stakeholders frequently need to approve papers while on the go in today's mobile-centric society. But for stakeholders who are far away, the inability of document management and approval systems can limit and prevent timely approvals.



# CHALLENGES

## Limited Visibility

The current As-Is process it's possible that stakeholders aren't aware of the workflow process as a whole or the status of document approvals. This lack of openness may cause misunderstandings, and problems with accountability.

## Difficulty in Audit Trails

It might be difficult to keep track of and preserve audit trails for document approvals when using manual or paper-based procedures. Organizations may find it difficult to prove compliance with internal policies or regulatory obligations in the absence of an audit trail.

## Concern Related to Data Security

The main concern is safeguarding confidential information from breaches, illegal access, and data loss when managing documents manually. Sensitive information contained in physical documents is at danger of theft, loss, or destruction, which could compromise its security.

# TO BE PROCESS

## Electronic Document Management Systems (EDMS)

The Electronic Document Management System can be used to replace the manual paper-based approval processes.

## Enables approvals and collaboration

The EDMS can be used as a mainstream medium for approvals using automated workflow and electronic signatures and serves as a platform for multiple people to collaborate to a single document.

## Central and Secure Storage

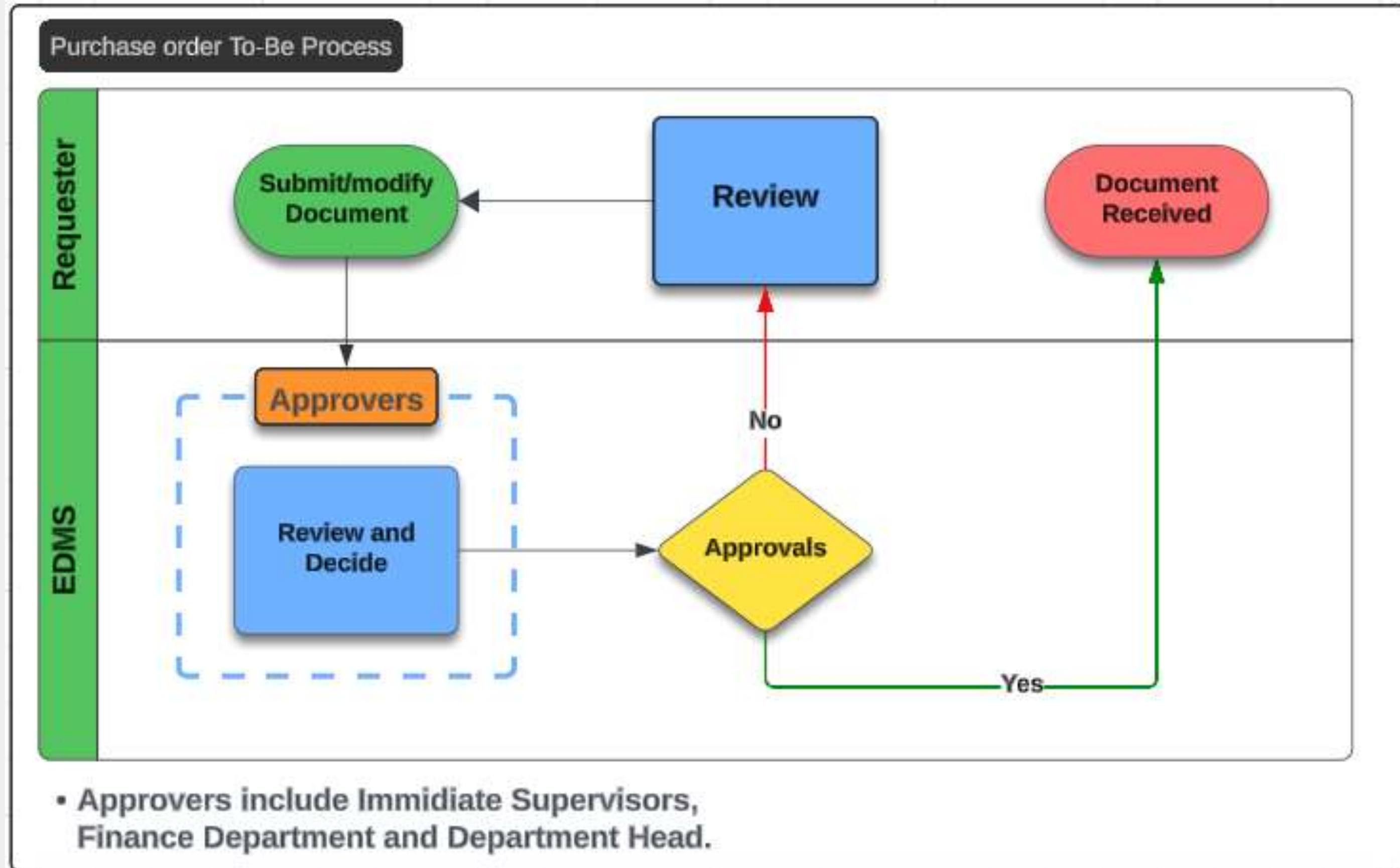
A central location to store all the files and documents securely, reducing the risk of losing paperwork. It helps in version control of documents.

## Dashboard Tracking

A personalized Dashboard can be created to help the companies and clients track the documents.



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# BENEFITS

## ENHANCED EFFICIENCY

Automation of approval workflows with an Electronic Document Management System (EDMS) speeds up the entire approval process.

## STREAMLINED COLLABORATION

An EDMS facilitates efficient collaboration, allowing simultaneous work on documents without version conflicts.

## COST REDUCTION

Electronic workflows ensure completeness and correctness, reducing errors and compliance issues.

## DECISION MAKING

Faster processing and readily available information enable swifter decision-making.

## ENHANCED SECURITY

Centralized storage in an EDMS enhances security against unauthorized access..

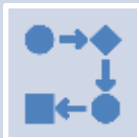
## REAL-TIME TRACKING

Personalized dashboards provide real-time tracking of document statuses, improving transparency.

# CONCLUSION



Transitioning to an Electronic Document Management System (EDMS) modernizes processes for increased efficiency and accuracy.



The revamped workflow ensures streamlining and error reduction.



Implementing an EDMS eliminates challenges, enhancing productivity.



This system enables seamless collaboration, reduces processing time, and provides greater visibility and control.



Overall, adopting an EDMS enhances efficiency, reduces turnaround time, and offers transparency for all involved parties.

The image features a light gray background with the text "THANK YOU" centered in a dark blue, serif font. The corners of the image are decorated with clusters of semi-circular shapes in teal, yellow, and coral colors. In the top-left corner, there is a small cluster of a yellow semi-circle and a teal semi-circle. The top-right corner features a larger arrangement of yellow, coral, and teal semi-circles. The bottom-left corner has a cluster of coral, teal, and dark blue semi-circles. The bottom-right corner contains a cluster of teal, yellow, and coral semi-circles.

THANK YOU