

DocuWare Sales Planner

The * indicates drop-down select lists. Fields in italic are mandatory

Company: <i>R & K Specialized Homes</i>	Industry: <i>Healthcare</i>
Contact: <i>Rachelle Barabe</i>	Role*: <i>technical decision maker</i>
Phone: <i>210-805-0802</i>	Budget*: <i>approved</i>
E-Mail: <i>rbarabe@rkhomes.net</i>	
Street: <i>1550 NE Loop 410, Suite 206</i>	Expected Decision Date: <i>01.01.2016</i>
ZIP-Code: <i>78209</i>	
City: <i>San Antonio</i>	
Pain Points EZContentManager is the current DMS and is highly unuser friendly. Workflow is challenging thus causing major delays with AP approvals. Customer has reached the limits of current provider and wants a system they can grow into and expand capabilities. Having to use a second application named Fast Doc in order to OCR documents. Manual data entry. Lengthy approval process. Breach of security in the past caused by hack.	Expected Benefits More automation with less human involvement. Application that ties directly into Sage Accounting software. Eliminate manual data entry. Faster approval process through AP. Have the capabilities of re-routing workflow "on-the-fly." Provide easy/digital access to an over abundance of auditing entities throughout the year from many different regulators. Data security.

Sales Rep Paz Galambos	DAC Michael Bodis
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Decision Makers

Name	Function:	Role*	Attitude towards DMS*	Attitude towards DW*
Rachelle Barabe	CFO	technical decision maker	positive	positive
Zeke Hernandez IV	CEO	budget decision maker	positive	positive
Tania Hernandez	HR Director	user	positive	positive
Bret	Finance	user	positive	positive

Document Types

☒ Paper
☒ Files
☒ Print-Output
☒ Faxes
☐ Drawings
☒ Emails
☒ Other: Receipts

Departments

☒ Accounting
☒ Controlling
☐ Customer Service
☒ HR
☐ Logistics
☒ Management

☐ Production
☐ Purchasing
☐ Quality Assurance
☐ R&D
☐ Other: _____

DocuWare-Products

Server: ☒ PROFESSIONAL ☐ ENTERPRISE
Client/licenses: -1012 ☐ WEB CLIENT SERVER
Modules: ☒ Import ☒ Smart Connect ☐ Connect to
☒ Barcode&Forms ☒ AUTOINDEX ☒ Outlook
☒ Workflow ☒ Task Manager ☐ Mail
☐ Request ☐ Mobile ☐ SAP

Timetable to Implementation *Please enter date

Presentation:	<u>11-12-2015</u>	Installation:	<u>1-4-2016</u>
Configuration Development	<u>12-14-2016</u>	Going Live:	<u>2-1-2016</u>
Order:	<u>12-1-2015</u>		

Client Presentation Preparation

The Process:

- Obtain information about the process and how documents are handled.

I am not a specialist in the <particular>department in the <add industry type> industry but I want to learn more about your daily business. May I ask you to explain to me how a typical day looks relating to the documents you handle? (Find out about most critical business processes, document types, volumes, etc.)

Notes/Graph/Workflow Diagram

Currently scans are routed to a weekly scan folder which gets monitored and routed/stored appropriately but not in a timely manner thus causing delays in AP.

Once complete, these scans are in the sent to yet another folder for one year and are held at this location.

The customer has years of documents, onsite, in two separate closets stacked from floor to ceiling.

- Find out where the Pain is

Which of the steps take the longest/generate the most hassle?

AP can be delayed up to one week due to inefficiencies from paper making its way to the one week scan folder, into AP and then through the approval process. Sometimes the individuals who need to sign off on the approvals are traveling to offsite locations and are unavailable until physically present back at the main office.

Currently the customer is using a light DMS named EZContentManager. The customer is limited to (3) concurrent licenses and would like to have 10-12 licenses. Scanning is also limited to AP and the customer would like to further scan to HR and other areas within finance.

Scanning with barcodes in the HR department would be beneficial as employee packets are approaching 20+ pages.

Security has been an issue in the past with the customer having been hacked. Sensitive information such as driver's licenses, social security card information and other personal information have been compromised. Data security is a major topic of discussion with bringing clients to the document rather than the document to the client.

The customer currently has 27 homes which are being managed with each home having a workstation. Having the ability to log into the system via HTML5 is appealing as that is not an option through the current DMS.

Summary of Pain Points

Delays in AP cause delays in getting funding with Medicaid thus creating a snowball effect throughout the organization and creates a choke-point with financial impacts to the business operations.



Proposed Solution Profile & Investment Options

DocuWare Professional Server

Flexible server for mid-sized organizations. One End-User Organization per DocuWare System. Unlimited file cabinet size. Synchronization of file cabinets at remote sites (requires additional server license). One server license for usage on one server.

12 Concurrent DocuWare Client Licenses

HTML5 browser based users. Can Split (12) concurrent licenses into (24) named licensees.

DocuWare Connect to Outlook

Structured storage of email integrated in Microsoft Outlook. Access to stored mail inside Outlook's user interface.

DocuWare Smart Connect

Fully automated retrieval and indexing of documents from third-party applications. By clicking a button, the document is displayed immediately on screen.

DocuWare Task Manager

Controlling of document workflow processes through Task Lists in Web Client. Email Notification for new documents or changed index values.

DocuWare Workflow Manager

Structured workflows with out-of-office and escalation management. Definition in graphical workflow designer.

DocuWare Barcode & Forms

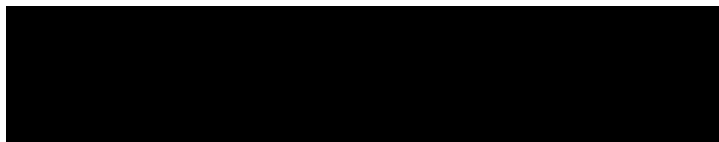
Detection of barcodes and text on documents for automating further processes such as page separation and indexing.

DocuWare Import

Automated Import of files to DocuWare baskets and file cabinets. Supports network scanners and digital copiers.

DocuWare Mobile

Document retrieval and display, task list and stamps for document approval with iPhone, iPad, Android smartphones & tablets, Blackberry, Windows 8 as well as Windows Phone 7 and Windows Phone 8. Where additional apps are required they can be downloaded for free from the respective stores. The license is required for document upload into DocuWare with PaperScan.



Install, Training, Service, Support and Updates

Texas Document Solutions believes that software should be a tool for your business to resolve certain challenges and therefore provides installation, training, service, updates, and support under the scope of this project for the life of the rental. Includes (7.5) days of professional services for installation and configuration.