

# GETTING STARTED ON DOCUMENT MANAGEMENT, SCANNING & WORKFLOW AUTOMATION



**PAPERLESS TRAIL INC.**  
People . Technology . Innovation

Join us for a short 4-hour seminar and understand how workflow automation, document management, and scanning can help your business.

This seminar will help you understand:

- How workflow automation can be applied to your business
  - How it alleviates stress and give you peace of mind
  - How it can double staff efficiency and consistency of service
  - How it can cut costs on training
  - How scanning and a document management software can help increase efficiency across departments and save admin and retention costs
  - How it secures your documents and helps you stay compliant
  - How it promotes collaboration across teams, and track version changes
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## PART 1: Introduction to Workflow Automation

- Activity Factory Presentation

How workflow automation improves efficiency

- Works 24x7
- Standard and consistent execution of processes
- Automation simplifies training

Productivity Demo

- Work coordination
- Documentation and checklists
- Tracking progress of all processes
- Going mobile
- Security with One-Time Passwords

Getting Started

- Starter Packages
- Why Microsoft Azure

## PART 2: Introduction to Scanning and Document Management Systems (DMS)

- Scanning Video
- Introduction to Indexing
  - Why you need to index
  - Planning for indices
- Archive One Presentation

Business Case

- How a DMS implementation can **save up to 80%** on retention costs

Productivity Demo

- Search Efficiency
- Compliance Reporting
- Security and Audit

Getting Started

- Starter Packages
- Total Cost of Ownership (TCO)

Q & A

- Open forum for questions