KOFAX

Twinings

Kofax Capture and Kofax VRS Elite enable documents to be captured, archived and retrieved easily and efficiently in Microsoft SharePoint environment

The Challenge

Twinings' first data management system from IBM (FileNet Content Services) used Kofax® scanning software to capture and manage the storage of HR and finance related documents within the business. However, with more than 3,500 invoices handled each month in the finance department alone, the FileNet system proved to be too cumbersome and outdated to handle the vast amount of information.

With the number of invoices and sensitive HR documents only set to increase, management at Twinings realized that they needed to implement an upgraded document management system that could reduce the dependency on physical file stores, allowing for data to be scanned as soon as it entered the organization.

"We have to deal with a high volume of data on a daily basis. With invoices needing to be processed rapidly, outdated systems can be costly, paper intensive and time consuming," explains Sandra Burch, accounts service manager at Twinings.

"There can often be a lot of time and space taken up storing large quantities of invoices that need to be processed or transferred to different departments. A paper-light office means that we can improve our overall speed, efficiency, control and quality of operations," continues Burch.

Accessibility was another challenge that the organization faced. With the FileNet system, it was often difficult to search the online archives for files.

"Often, we have to keep track of invoices and go back on transactions if needed. It's extremely important that we have immediate access to files, so that queries and discrepancies can be managed," continues Burch.

The Solution

In 2009, Twinings worked with DeltaScheme as their Microsoft Implementation Partner, to implement Microsoft Office® SharePoint Server as their corporate Intranet and document management system, replace the existing Filenet setup.

TWININGS

Tea specialist, Twinings is an international organization selling more than 200 teas in more than 100 countries throughout the world. As the company expanded, both the human resources and finance departments experienced an increase in the number of transactional documents that needed to be managed and stored securely.

Products in Use:
◆ Kofax Capture™ and Kofax VRS Elite™

Focus: Human Resources

> *"The Kofax and SharePoint solution means that documents can be identified, classified and transferred into a centrally managed storage platform, reducing the need for physical storage space."*

Sandra Burch, Accounts Service Manager, Twinings

As a combined solution, Kofax Capture and Kofax VRS Elite were incorporated as the corporate standard for scanning physical records into SharePoint, enabling documents to be captured, archived and retrieved easily and efficiently.

Kofax Capture provides industry leading scan-to-archive capabilities by scanning documents and forms to create digital images, extracting index data for retrieval purposes and delivering the images and associated data to a variety of repositories and applications. This can significantly reduce retrieval costs while improving regulatory and compliance efforts. Kofax VRS Elite is Kofax's patented image enhancement and perfection software. Kofax VRS Elite reduces the time involved in manual document preparation and enhances the quality of scanned images, dramatically improving both manual scanning productivity and the efficiency of document capture processes.

SharePoint was chosen as a document management repository upgrade because of its flexibility with existing business processes. As a reliable data capture solution, Kofax software could seamlessly integrate with the new system.

The Results

The combined Kofax and Microsoft SharePoint solution has enabled the HR and finance departments to improve their efficiency and productivity with a centrally managed single silo for both paper and electronic content.

"Without clear processes for storing and transferring information as it enters an organization, data can be lost, sent to the wrong office or disposed of, rather than arriving at its proposed destination," explains Burch. "The Kofax and SharePoint solution means that documents can be identified, classified and transferred into a centrally managed storage platform, reducing the need for physical storage space."

The platform also enables HR and finance staff to access a range of documents in a matter of minutes as opposed to hours or days, regardless of their physical location.

Today, since migrating from FileNet, Twinings has upgraded to Microsoft SharePoint Server 2010, while still incorporating Kofax capture software. As a reliable solution to Twinings' information management challenges, the platform is flexible enough to be rolled out across other business functions within the organization."

We would have no hesitation in turning to Kofax for other areas of the organization. What impressed us about the Kofax and SharePoint migration process was that after a small amount of testing with DeltaScheme, the software just worked. Using Kofax Capture and Kofax VRS Elite, Twinings is able to manage hundreds of thousands of incoming pieces of data in a fast and accurate manner, allowing employees to concentrate on core business tasks," concludes Marc Stamper, Business Systems Analyst Developer at Twinings.

For more information, visit kofax.com.

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