



**Rapidly Automating
Document-centric
Processes With
Newgen
OmniDocs ActiveScript**



**With COVID-19, working from home has become the new normal.
Your employees and documents are no longer co-located.**

What does this mean for your business?

- Lack of collaboration
- Limited access to information
- Lag in customer service
- Delay in decision-making

It's time to restore your manual or partially-automated business processes.

"Fully or partially manual processes only function when workers and physical files are located in the same place. That's why millions of people working from home has resulted in complete breakdowns of key operations for enterprises that depend on manual processes."

*Source: Forrester**



Over **70%** of organizations still have paper-based process dependencies

Most operational processes today are still manual, or at least partially automated. However, COVID-19 has created a sense of urgency across all industries, driving enterprises to automate their processes in order to survive and stay competitive.

But, where should you begin?

Document-centric processes are the worst hit

You need a comprehensive digital document processing strategy that fosters a remote working environment, enables intelligent processing, and virtually co-locates your employees and documents. To achieve all this, you need a software that:

- Imports, digitizes, processes, and archives physical and electronic documents
- Is available for immediate go-live to ensure the restoration of broken processes and to maintain business continuity
- Can be deployed on cloud to enable anytime, anywhere access to documents while ensuring security and compliance

The time to act is now!

6 Key Considerations While Implementing a Digital Document Processing System

1. Multi-channel Intake

Your customers may share documents via any channel, be it e-mail, social media, or in-person. So, the system you invest in should support document intake from multiple channels and data capture from index fields.

2. Indexing

You can easily locate information using indexes by associating metadata with documents and folders. For instance, for the account opening process, documents can be associated with the following index fields:

- CIF number
- Customer name
- Branch
- Date of account opening

Similarly, a file in a government office contains multiple documents, including correspondences from various government departments. So, the file will have folders indexed as:

- File number
- Subject
- Department

3. Document Processing

You must define the role of maker and checkers so that documents are auto-routed, thereby facilitating seamless processing.

4. Repository Structure

You should organize the repository based on your enterprise's departmental structure. All departmental documents must be stored under the respective departmental entities and business documents should be organized based on the lines of businesses (LOBs).

5. Search Operation at Document and Folder Level

Easy access to information is one of the main value-adds of a document processing system. When you are selecting a system, ensure that it supports:

- Search using business indexes
- Search using a combination of folder and document indexes
- Search using native attributes
- Keyword-based search
- Content-based search
- Filters and sorting

6. Permission Access and Administration

You need to ensure secure access to the repository, using the restricted access permission capability, so that only the intended users can view, add, or modify documents.

A user group should be created for each department or LOB. It is advisable to grant access permissions at the level of user groups, rather than specific users. Also, setting access permissions at the folder level will simplify the management and maintenance of your documents.

Beyond these considerations, the platform should offer features that deliver operational benefits such as user personalization, document versioning, check-in, checkout, and more.

Quickly Automate Document-centric Processes with Newgen OmniDocs ActiveScript

- Automate your industry-specific, document-centric processes with **100+ ready-to-use templates**
- Create a digital workplace with anytime, anywhere access to documents
- Ensure compliance with document management and storage regulations
- Deploy on cloud within **three weeks**



Manage Documents With a Three-step Approach

Initiate, Process, and Archive

1. Initiation

The system facilitates the intake of a large volume of documents from various channels, including mobile, e-mail, web portal, in-branch, and more. It ensures the accuracy and completeness of data by capturing, indexing, classifying, and verifying information.

For instance, when the system receives a letter of credit (LC) application, the attached documents are scanned and classified into various document types. And, data entry is done on key fields, such as country, product, location, customer, amount, etc.

2. Processing

The documents are then routed to the concerned departments for further processing. The system supports multi-step processes, where documents and their attached metadata and actions flow

seamlessly from one step to another, and offers exception management capabilities.

In the case of an LC application, If the customer has an inadequate credit line, the user can raise an exception to their superior to resolve the exception.

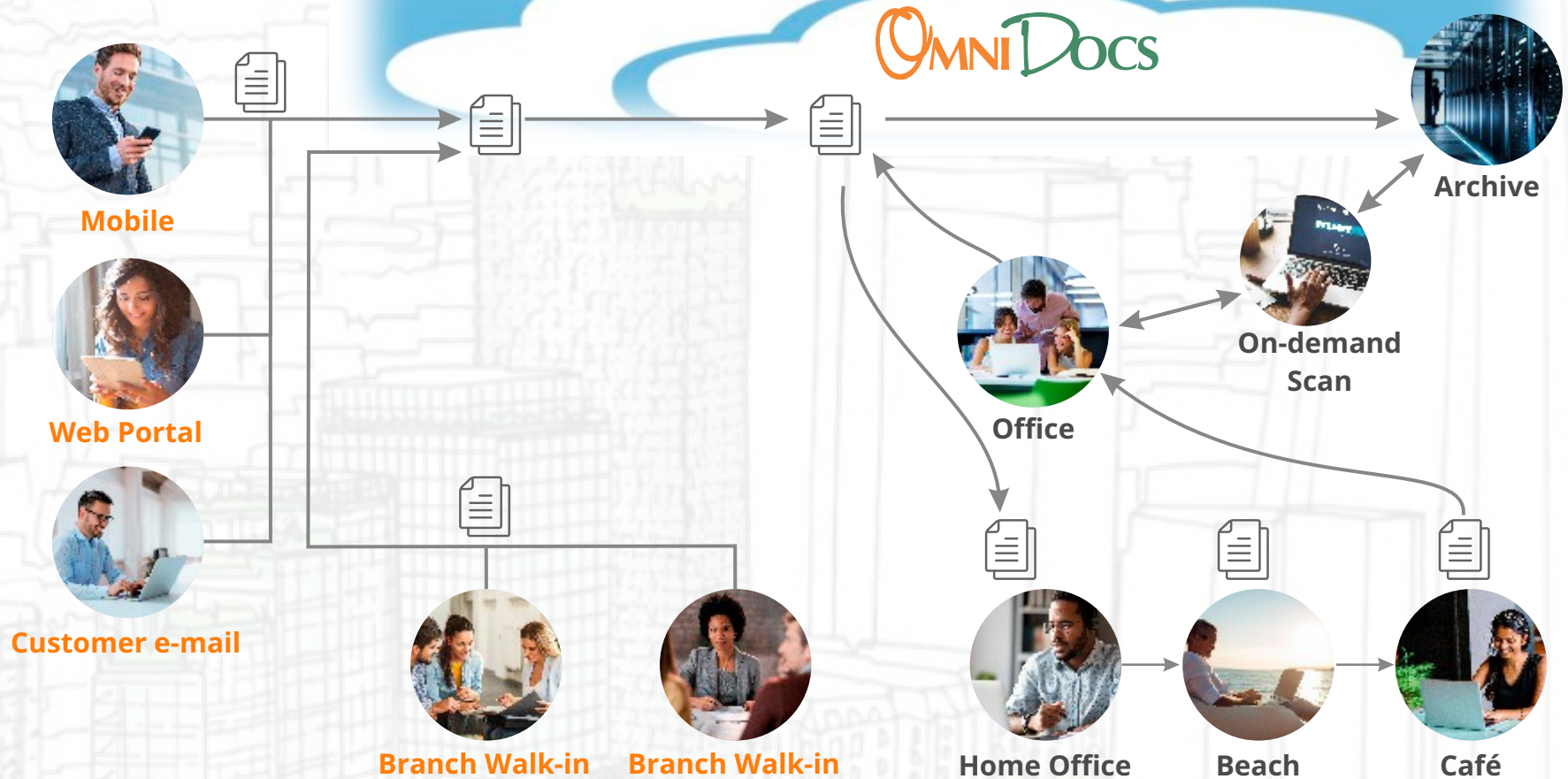
3. Archival

After processing, the documents are stored securely and can be accessed easily. The system offers a centralized repository with proper indexing, allowing for easy search and retrieval of information.

Initiate

Process

Archive



A Collection of Industry-specific ActiveScripts, Deployed on Cloud, for Out-of-the-box Experience

Banks and Financial

- Account Opening
- Personal Loan Application
- Mortgage Loan Application
- Credit Card Application
- Account Service Request Application
- Address Change
- Credit Card Limit Enhancement
- Nominee Addition
- Loan Restructuring
- Tenure Change
- LC Application
- BG Application
- Cash Management
- Teller Operations
- Funds Transfer Request
- Standing Instruction Request

Insurance

- Policy Application
- Claims Applications
- Policy Servicing
- Policy Address Change
- Policy Additional Rider
- Address Change
- Agent Onboarding
- Charges and Commissions

Government

- License Renewal
- Certificate Issuance
- File Movement
- Correspondence Movement

Construction

- Worker Records
- Contracts Renewal
- Project Reports

Corporate Functions

- Vendor Approval
- Merchant Approval
- Audit Documents
- Invoice Movement
- Fixed Asset Movement
- Employee Onboarding
- Employee Appraisal
- Employee Retiring
- PR Movement
- Employee Documents
- Contracts Approval
- Petty Cash Handling

Oil and Gas

- Bid Review
- Board Meeting Minutes
- General File Movement

Newgen OmniDocs ActiveScript - Use Cases

Case 1 - Consumer Loan Approval

- **Initiate** the process with the submission of an application form and any supporting documents, received physically or via an e-mail
- **Process** the application form by routing it to an operations executive to ensure accuracy and then to a credit officer for credit analysis. Next, update the application data into the core banking system
- **Archive** the application and any supporting documents into the repository after indexing and filing



Case 2 - Invoice Processing

- **Initiate** the process with the submission of physical invoices or an e-mail containing digital invoices
- **Process** the application form by routing it to a finance executive for validation. Then enter the data into an ERP and perform two and three-way checks
- **Archive** all the invoices into the repository after indexing and filing

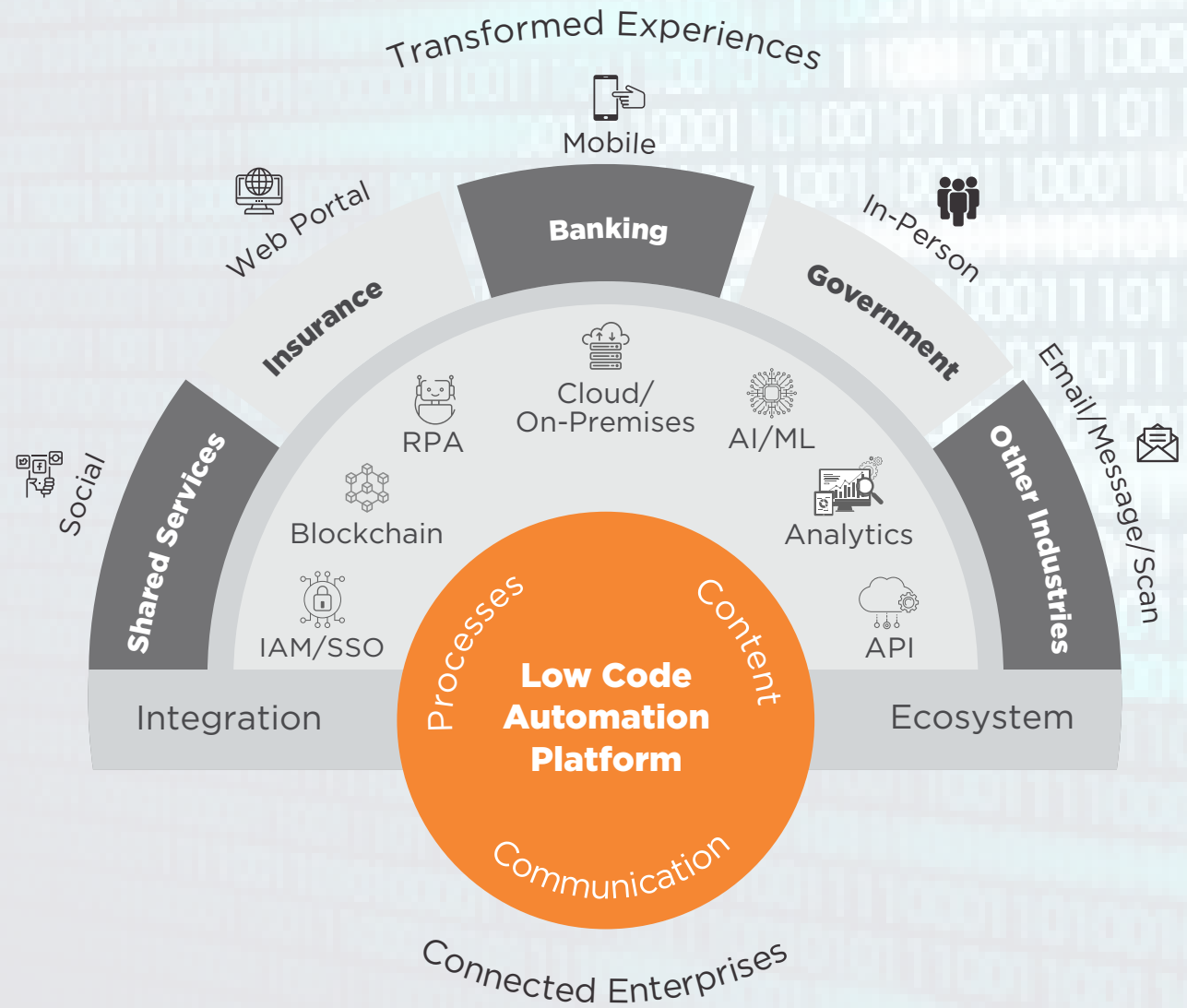
Case 3 - Policy Onboarding

- **Initiate** the process with the submission of an application form and any supporting documents, received physically or via an e-mail
- **Process** the application form by routing it to an operations executive for validation and then to an underwriter for policy underwriting. Next, update the application data into the core insurance system
- **Archive** the application and any supporting documents into the repository after indexing and filing



ActiveScript, with a Solid Backbone of OmniDocs Contextual Content Services (ECM)

- **Enterprise repository of all content types**
- **Centralized and secure storage of documents**
- **Anytime, anywhere access to documents**
- **Content capture from multiple sources**
- **Search and retrieval from millions of documents, in seconds**



Why Newgen's OmniDocs ActiveScript

- Achieve faster go-live within **three weeks** with a ready-to-deploy software
- Automate **100s of document-centric processes** with customized ActiveScripts
- Ensure **completeness and accuracy** of data
- Enable **remote working** with easy access to documents
- Ensure **business continuity**
- Deploy on **cloud for an out-of-the-box** experience



You may also like to read:



COVID-19 Remote Work Just Broke Your Processes: Here's What To Do About It

Processes That Were Just Inefficient Last Month Don't Work At All Today
By Rob Koplowitz, John R. Rymer, Margo Visitacion with Christopher Mines, Abigail Livingston, Rachel Birrell

April 23, 2020

Why Read This Report

Automating business processes to win, serve, and retain customers has been an imperative for years. With COVID-19 sending workers home to work en masse, the goal for many has become restoring manual processes that have either failed completely or been crippled. Read this report to learn how to mitigate the current business disruptions and set a foundation for faster, more agile process automation going forward.



Are your documents slowing you down?

5 ways ECM can help you streamline your documents and ensure business continuity



Connecting Enterprises. Transforming Experiences.



7 Steps to Business Continuity

The Newgen Way

A Newgen guidebook on how to not only survive, but also thrive in crisis situations like COVID-19

A crisis like the COVID-19 outbreak causes a worldwide situation that is unprecedented for most businesses. How do you handle it not only for today, but also to emerge stronger in the aftermath?



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