



Kofax Case Study

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– Laura Halls, Information Support Manager



Integral Energy is the second largest state-owned energy corporation in New South Wales. Integral Energy distributes electricity to more than 2 million people in households and businesses across Greater Western Sydney, the Illawara and Southern Highlands of NSW. Today, the company also operates in Queensland.

Kofax Capture Solution Enables Integral Energy to Streamline Document Processing and Improve Business Processes

Leading Australian Energy Provider Utilizes Kofax Solution to Reduce Costs, Improve Efficiency and Increase Accuracy of Document Processing

Challenge

Information Support Team is viewed as a business partner and facilitator in the management of business records for all business units within Integral. The ongoing management of paper records is essential in all business processes of Integral Energy. Without electronic capture of records, the business processes of Integral could be exposed to risks associated with confidentiality and compliance. As a state owned corporation, Integral is required by legislation such as the State Records Act, to maintain full and accurate records of its business transactions.

Integral needed a solution to automate and streamline its records capture processes. Information Support Team has a firm commitment to transitioning to complete electronic records management to realize enhanced efficiencies. The largely manual process associated with filing, retrieval and storage of records was identified as being time consuming and able to be greatly enhanced.

Further requirements for the solution was that it must integrate seamlessly with Integral's existing DOCS Open recordkeeping system and provide a unified platform for improving business processes. The platform also needed to be scalable for future growth.

Solution

A prior Kofax customer for several years, Integral Energy had experienced the positive results of a Kofax Capture™ solution. In 2007, Integral Energy elected to roll-out an enterprise-scale Kofax solution, which comprised the following elements:

- **Kofax Capture**, the world's leading information capture software platform, which automates the scanning of paper or importing of electronic documents and forms,
- **Kofax VRS Elite™**, the de facto standard for increasing scanning productivity by enhancing the quality of scanned images regardless of the condition of original documents,

- **Kofax Transformation Modules™**, which intelligently automates the classification, sorting and separation of paper and electronic documents and forms, and then extracts and validates the information contained therein.

The Kofax platform enabled staff to scan, capture and process various records at point-of-entry in the organization. Once data was captured, the Business Units were able to access records immediately in the DOCS system or in their own business systems. This greatly reduced the need to courier paper documents to various sites.

Information Support team commenced back-scanning all personnel files in December 2007. The back-capture project was completed in May 2009 and over 2,600 files were scanned. The HR department now not only works without physical personnel files but also has instant access to staff information. This means enhanced productivity since the time taken to collect, file and retrieve personnel records has been significantly reduced. Security of information has also improved and the risk of loss of irreplaceable personnel files was removed.

This year, Integral Energy upgraded to the latest versions of Kofax Capture and **Kofax Transformation Modules**. With the enhanced features of the newer versions, Integral recognized immediate improvements. Data extraction has improved from 50% - 90%, and Integral are now processing 150,000 pages a month as compared to 30,000 initially and this is continually growing.

In Kofax Capture, average key strokes have reduced from 30 keystrokes per document to 19 keystrokes per document. The ability of Kofax to retrieve information from databases and other business systems was a major contributing factor to this success.

Initially, many users were reluctant to move to the new systems because they were more comfortable with paper files. However, due to the team's efforts and also the usability of the systems, feedback has become increasingly positive. Integral have now successfully deployed Kofax's solutions to various depots and business units, staff are no longer sending documents to the Information Support Team for scanning. This produced faster access to information and better document integrity because the paper documents never leave the originating office and cannot be lost in transit.

Scanning kiosks have been set up at various depots so that as many as 90 staff are now performing their own scanning and indexing. The paper records are "day boxed" for 6 months after scanning and then disposed in security bins, eliminating the need for filing and long term document storage.

The Information Support team is now working with Kofax® to configure the system to capture all data required for processing invoices. This data will be automatically uploaded to Integral's Ellipse Financial system and DOCS Open records management system. With Kofax's solution in place, data validation will be reduced to just one point in the process resulting in much improved data accuracy and shorter processing times.

Results

As a result of implementation of the Kofax solution, Integral Energy has seen significant improvements in productivity, efficiency and accuracy of its records capture processes.

"The Kofax solution enables us to scan and capture various records for many internal departments and then upload data and images to Business Systems as well as the DOCS Open Recordkeeping System," said Laura Halls, Information Support Manager. "This has significantly improved staff efficiency and facilitated a faster processing and approval turnaround time."

"We are particularly pleased with the auto-learning feature in KTM, which has greatly improved data extraction. Other features such as the point-and-click as well as the rubber band feature in Kofax were good to use and played a part in enabling us to improve productivity. The Information Support team has relentlessly persevered in sharing knowledge and use of Kofax's solutions with Integral Energy's staff. As you can see, more and more departments and processes now utilize Kofax's solutions. The result is obvious, and despite initial resistance, more and more users are now using and enjoying the benefits of using the system," said Joan Collett, Information Support Team Leader.

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About Kofax

Kofax® plc (LSE: KFX) is a leading provider of innovative smart capture and process automation software and solutions for the business critical First Mile™ of customer interactions. These begin with an organization's systems of engagement, which generate real time, information intensive communications from customers, and provide an essential connection to their systems of record, which are typically large scale, rigid enterprise applications and repositories not easily adapted to more contemporary technology. Success in the First Mile can dramatically improve an organization's customer experience and greatly reduce operating costs, thus driving increased competitiveness, growth and profitability. Kofax software and solutions provide a rapid return on investment to more than 20,000 customers in financial services, insurance, government, healthcare, business process outsourcing and other markets. Kofax delivers these through its own sales and service organization, and a global network of more than 800 authorized partners in more than 75 countries throughout the Americas, EMEA and Asia Pacific.

For more information, visit www.kofax.com.