

ARTSYL

Intelligent Process Automation

Tiger Electric Automates Workflow and Eliminates Manual Data Entry with docAlpha and KwikTag

The Challenge

As the head of data retention at Tiger Electric, Toni Johnson wears a lot of hats and spends a lot of time helping the Colorado-based electrical contracting company to ensure that all data, documents and processes related to managing their 300+ subcontractors and hundreds of commercial, residential and industrial projects are in order.

Managing all of that information and related documents efficiently and effectively not only allows the company to better manage projects, as well as their finance processes, including accounts payable and receivables.

During her four+ years at Tiger Electric, Johnson has worked to help streamline and automate as many processes as possible to ensure that the company can continue to scale and grow their business without tripping over operational hurdles.

One of the big hurdles Tiger Electric had to overcome was the management of thousands of paper and electronic documents and related processes to onboard and manage electrical contractors, as well as maintaining dozens of documents related to each project.

When it came to scanning paper documents, often a single residential project could require 35 to 40 minutes, occupying the company's printer/scanner, but also consuming the time of a valuable team member.

The process was particularly painful for accounts payable and invoice processing.

"[In the past,] somebody would have to scan in a receipt, scan in the invoice, and then scan in the paperwork from our side for that invoice and repeat that process 100 times a day. So it was very, very, very tedious and time-consuming."

The Solution

According to Johnson, Tiger Electric chose to implement the KwikTag enterprise content management system from ImageTag to better manage all of the documents related to their business processes. As a result, Tiger Electric would be able to handle their business documents in a way that was streamlined and more efficient.

One key component to getting both scanned paper and electronic documents into KwikTag efficiently, by automating the painful process of data entry and manual filing of documents into the right folders was a solution called docAlpha, from Artsyl Technologies.



Client

Tiger Electric

Family owned and operated since 2003, Tiger Electric is the trusted local electrician company of Western Colorado. The company's professional, licensed, certified, and experienced electricians possess decades of electrical experience in commercial, industrial, residential and solar projects.

Industry

Commercial, industrial and residential electrical contractor services

Needs

- Achieve greater efficiency related to managing documents related to building projects and
- Achieve better visibility and control over AP and AR processes
- Relieve staff of the burden of manual scanning and filing
- Integration with KwikTag ECM

In support of Johnson's goal to streamline both scanning and filing process, docAlpha intelligently identifies data within scanned paper and digital documents, like a builder name or work order number, so it can pass along information to KwikTag to trigger drives specific workflows. Those workflows then route documents to appropriate stakeholders or associate a document with specific contractors or projects automatically.

The Results

According to Johnson, merging the capabilities of docAlpha and KwikTag has helped Tiger Electric to achieve a new level of control over their processes while increasing efficiency.

Those efficiency gains largely came from allowing Johnson's staff to batch scan documents all at once, then relying on docAlpha to automatically sort through them, identify the document types and provide data to KwikTag so they could be filed automatically and associated with the right cases in the system.

"In the past, it was taking us 35 to 40 minutes to scan in one residential folder—as opposed to one and a half to three minutes scanning it and relying on docAlpha," Johnson said.

For every address we have a folder that contains ten to fifteen blueprints, and at least one to two hundred documents, work orders and service tickets. We're scanning one batch with a cover sheet that will tell it where to go to," she added.

As a result, Johnson's team has been able to be more efficiency and effective and work together more closely has a team.

"It brought everybody together as far as camaraderie goes, because before you really couldn't help someone else get caught up because you would be standing at a copier scanner and doing individual documents at a time," Johnson said.

With a system in place that could reliably handle their document management and process automation needs, Johnson has looked for ways to continue to streamline processes and increase efficiency.

"We rely a lot on workflows and have created 13 of them in KwikTag, supported by docAlpha," Johnson said. What was most important to her and her team was that they could create or modify their own workflows using the system.

"The greatest thing that has come our way from Artsyl with docAlpha is that it has saved us so much time."

Solution

- docAlpha Smart Process Platform
- Integration with KwikTag ECM

Results

- Accurate automatic sorting, filing and indexing of documents for multiple processes
- Automatic extraction and validation of relevant data from scanned paper and digital documents
- Integration with KwikTag delivers workflow automation within the need for manual input