



**Workflow Professionals** is the authorized distributor of **Paperless Environments™** Imaging and Workflow Automation (IWA) solutions for the Western U.S. and Canada. We provide software, training, implementation and consulting services to help contractors and other businesses manage transaction processes, documents, and their content more efficiently.

Information management and business processes tied to paper documents can be streamlined and made more efficient using modern imaging and database technologies. With paper based processes Accounts Payable invoices, Payroll timesheets, Customer billings, and countless other documents are copied, distributed, reviewed, coded/annotated and approved before their information is entered into the corporate accounting system or other application. After the information is processed, the source documents are filed and maintained for audits, regulatory compliance, and future reference. Storing paper documents in file cabinets, boxes or offsite warehouses makes them hard to find, easy to lose, and expensive to maintain. Managing paper documents consumes time, money and space that could be used more productively.

We provide industry specialized, leading technology imaging and application software, together with expert consulting and training services, to streamline your business processes and document management systems, reduce the financial and environmental impact of your paper documents, and help your business run more efficiently.

**Paperless Environments™** software digitally captures the image and content of your paper and electronic documents; applies flexible workflow automation processes for routing, annotation and approvals; and integrates the electronic workflow processes and data with your existing information management applications and infrastructure. Implementing our solution enables your organization to maximize the efficiency of your document management processes, and realize the significant time and cost savings of a “paperless environment”.

### **Why Choose Workflow Professionals?**

Our expertise in information management, enterprise accounting applications and industry specific requirements is built on thirty years of experience in the construction and accounting software industries. Our approach to doing business is designed to assure your successful migration to a paperless environment, and maximize the return on your technology investment. We commit skilled resources to develop a thorough understanding of your business, your information and document management processes, and your unique requirements. Then we provide a precision-tailored solution of software, training, implementation and consulting services to help your business implement imaging and workflow automation to manage documents and information more efficiently, more effectively, and more profitably.

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# PAPERLESS

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## Product Information Guide



# Who is Paperless Environments?



**PAPERLESS ENVIRONMENTS** is a content management and workflow automation solutions provider to the construction industry. Our products integrate electronic versions of paper documents and other digital information with your existing business applications and infrastructure.

*“Our customers routinely praise our products, citing a quantum leap in productivity, accessibility, and control.”*

Recent emphasis on regulatory compliance, cost containment and productivity enhancement has caused construction companies to seek ways to electronically automate traditional labor-intensive, paper-based processes. We utilize custom-built technology to create paperless solutions specific to the construction industry, which enable you to achieve maximum efficiency and profitability. In addition, our paperless solutions are backed by expert engineering and training, as well as support from people who “know” the construction industry and stay in tune with customer functionality requirements.

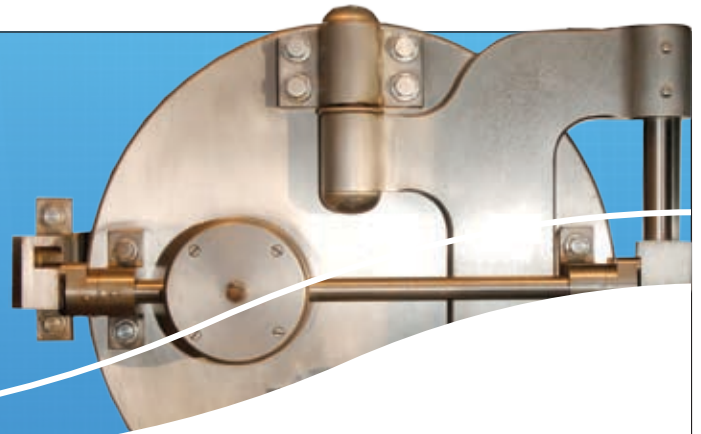
#### **Construction companies that utilize our products:**

- Experience increased efficiency and a significant reduction in the cost of handling paper within a few weeks after implementation.
- Like our ability to integrate seamlessly with their construction applications.
- Enjoy the simple user interface, expert engineering services and utilization of open architecture design for enterprise functionality.
- Realize immediate improvement in profitability.

#### **Why Choose Paperless Environments?**

We separate ourselves from the competition by offering paperless solutions that feature custom-developed, automated workflows, which fully integrate and leverage your existing business applications. Our products are flexible, scalable, and easy to use and maintain. And, with the industry’s only six-month money back guarantee, your investment in a Paperless Environments solution is virtually without risk. Join our growing list of satisfied customers who are realizing the cost savings and efficiency of a paperless environment.

# pVault™ Content Manager



pVault™ Content Manager is the foundation for all of Paperless Environments' solutions. All electronic business records that are created or received during normal business transactions can be captured and organized with pVault™ Content Manager for fast, easy, multi-user access and distribution.

Construction companies who use the Microsoft Windows file system to store electronic information agree that it causes many electronic file management issues. The lack of structure, one-dimensional search capability, and inability to control placement and naming of files creates issues like inconsistent file naming and placement, duplicate files stored in multiple places, and limited, or no life-cycle management.

pVault™ not only provides structured controls on how your company manages paperless documents and electronic files, but also acts as a tool to secure and manage electronic content so your organization complies with federal, state and local electronic information requirements.

## **pVault™ enables your organization to:**

### **CAPTURE**

- Scan paper documents with one, easy-to-use batch scan process.
- Capture electronic files via drag-n-drop, print capture, import, or Microsoft™ automation functionality.
- Route scanned batches electronically to processor for indexing and filing.

### **INDEX AND STORE**

- Define custom document types and indexes.
- Update index fields using Autobatch™ ICR/OCR technology, Bridge™ back-fill integration, or lookup validation to existing business applications.
- Index and store electronic files like Excel™ worksheets, Adobe™ Acrobat files, or Word™ documents.
- Index and store email records.

### **RETRIEVE**

- Retrieve images via any combination of index fields.
- Restrict users to view only allowed content with security driven access.
- Utilize integrated reporting to link business transactions with electronic content using Crystal Reports™.

### **DISTRIBUTE**

- Distribute documents via email, fax and/or print.
- Annotate your document images with stamps, notes, lines and signatures.
- Convert document images to PDF for universal distribution.
- Transport images as CD/DVD with viewer utilizing CDPlus™.

### **ARCHIVE, LIFE-CYCLE MANAGEMENT**

- Establish life-cycle scheduling and disposition for all your electronic content by document type and jobs.\*
- Create archive CD/DVD with CDPlus™.
- Place litigation "holds" on documents involved in claims.\*

\*Available in version 4.1.

# APFlow™

## Accounts Payable Workflow Module



The APFlow™ Accounts Payable Workflow Module replaces the manual invoice approval and coding systems—found in most construction companies—with a paperless process that can reduce the cost of accounts payable invoice processing, as well as improve invoice approval turnaround time by over fifty percent.

A custom-built Bridge™ links the APFlow™ module to your accounting software's data files to ensure high-speed validation and single-entry, single-touch integration.

Our customers agree that implementing APFlow™ has made such an impact on their accounts payable process that within a few months, the system returned most of its investment. The increases in efficiency and profitability comes from:

- Higher A/P invoice processing production.
- Reduction in handling/courier cost.
- The ability to take advantage of quick-pay discount opportunities offered by vendors.
- Instant access to accounts payable information and documents.

### **The APFlow™ Module can:**

- Batch process invoices and support documents at point of receipt.
- Eliminate manual pre-sorting of documents prior to scanning.
- Utilize a user-friendly invoice entry screen with optional Autobatch™ OCR functionality to reduce invoice data entry.
- Automatically match and index support documents with invoices.
- Build automatic, sequential route rules by invoice line items based on job, vendor, general ledger code, division, equipment or dollar amount.
- Provide a full-function, single-screen, point-and-click approval dashboard with all the necessary integration and information to accurately process and code invoices.
- Allow approvers to annotate and comment on invoice documents and track comments for later review.
- Provide instant status information on all pending invoices with intuitive A/P processor or management dashboard.
- Electronically export all A/P transactions to accounts payable module for payment processing.
- Automatically link scanned checks with electronic invoices and support documents for multi-dimensional, multi-index search and retrieval.
- Provide check signers with a check review tool to electronically view all invoice/support documents and reviewer notes.
- Link electronic A/P documents with accounting transactions using Crystal Reports™ drilldown.

# DocRoute™

## Document Routing Module



DocRoute™ document routing module extends the Paperless Environment's pVault™ Content Manager's distribution functionality. Content received by your company or stored in pVault™ can be distributed to members of the organization electronically using either pre-defined or ad hoc route rules.

DocRoute is designed with easy-to-use, point-and-click functionality so that anyone can learn to route documents and files throughout your company. DocRoute's user dashboard provides up-to-the minute information about the status of routed documents and tools to manage the progress of the document through its routing cycle.

### **The DocRoute™ module enables you to:**


- Route electronic documents and files using linear or looped routing sequences.
- Annotate or notate routed electronic content and store in pVault™.
- Establish pre-defined route rules, or build ad hoc routes on-the-fly.
- Store notes, annotations and audit information with each routed document.
- Reply, reroute, or recall routed content.
- Receive email notification of items routed to your inbox.
- Review status of items routed with dashboard or custom reports.
- Establish hard route-return dates and monitor route progress.
- Secure routed documents against unauthorized access and review.

### **Paperless Environments customers use DocRoute™ to:**

- Electronically route project management documents, (ie. contracts, job photos, change orders, etc.) around the company for review and approval.
- Enter and route human resource forms and documents.
- Build a paperless purchase requisition process.
- Review and approve service work orders.
- Electronically distribute plans and drawings to estimators for take-off.
- Electronically route and approve general ledger adjustment entries.

# The Bridge™

## Application Integration Module



The Bridge™ Application Integration Module provides integration between Paperless Environments' content management and workflow modules, and your enterprise applications.

Paperless Environments has pre-defined Bridge™ modules for most of the popular construction accounting, estimating, project management and service applications. Bridge™ integrations can be defined using many of the popular interface methods such as, ODBC, API, or XML, and ships with many of the database fields and tables available already integrated with your construction applications.

### **The Bridge™ enables your organization to:**

- Pull index data directly from your accounting or database system for validation and single-entry processing.
- Validate database information during OCR/ICR Autobatch™ processing and automatically backfill index information based on key fields.
- Use reporting tools like Crystal Reports™ to match database transaction located in your accounting system with corresponding images located in pVault™.
- Interface pVault™ with no effect on your accounting or database system.
- Access company documents and transactions without the need for additional high-cost accounting system or database user licenses.
- Eliminate index data entry by backfilling indexes from key fields in your accounting or database application.
- Invest in one Bridge™ module and have access to all accounting or database application fields and modules.

### **The Bridge™ can be used to:**

- Automatically update job and cost code index fields from scanned timesheets just by entering pay period and employee ID fields.
- Auto fill invoice number, purchase order number and customer name from scanned invoices just by entering order number.
- Provide lookup validation for vendors, jobs, etc., during invoice entry and coding.

# Autobatch™

## OCR/ICR Module



Autobatch™ OCR/ICR Module is a tool that uses OCR (Optical Character Recognition) and ICR (Intelligent Character Recognition) to read information from scanned documents and validate the data against your accounting or database system using Bridge™ to automatically update index information or eliminate manual data entry into your construction applications.

### **Paperless Environments can custom configure the Autobatch™ module to:**

- Read handwritten time sheets submitted from the field, validate information against your accounting database, check the math, automatically generate an import transaction for the payroll module, and store and index the timesheet.
- Read scanned checks from your accounts payable check module, and automatically update indexes with invoice numbers and other cross reference information.
- Read scanned vendor invoices and automatically update information in the APFlow™ invoice entry screen reducing the amount of data entry.
- Read scanned billing invoices, and automatically index and store documents.

# CDPlus™

## Distribution Module



CDPlus™ simplifies providing support documents for specific procedures like audits and time-and-material billing by enabling the assembly of scanned images stored and indexed in the pVault™. Once assembled, the documents can be copied to a CD/DVD, or other fixed storage device, along with a viewer for retrieval of images. All of the duplication is done without incurring the time and expense of producing and sending paper copies.

### **CDPlus™ enables your organization to:**

- Eliminate the need to copy accounts payable invoices used in T & M Billing.
- Provide instant document DVD's requested by auditors, project managers or owners.
- Instantly pull project management records and load them on a laptop for off-site job meetings.
- Off load plans and drawings to CD/DVD for electronic submittals.
- Pull T & M documents by job and date range, then backfill document indexes referencing invoice transaction record for historical information.
- Create job closing CD/DVD with all content stored in pVault™ for a project.



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# Why Go Paperless?

- 1 Would you like to have instant access to corporate documents and files, even from remote locations?
- 2 Have you ever needed a document but could not find it?
- 3 Are your electronic documents, emails, and files scattered around your network?
- 4 Do you know how much job cost is "out there" waiting for approval and posting?
- 5 Are your corporate documents "safe" in the event of a disaster?
- 6 Are you spending too much money on Fed-Ex, UPS, or other courier services?
- 7 Are your project managers spending too much time processing paperwork?
- 8 Are you using valuable office space for file cabinets and boxes?
- 9 Are you spending too much time and money on preparing backup support for audits, T & M Billings, vendor requests, etc.?
- 10 Would you like an electronic time collection system without changing your field processes?