



# ARTSYL

## Intelligent Process Automation

### Ohio Shared Information Services Combines docAlpha, Dynamics GP and KwikTag to Automate Its Payables Process and Boost ROI

// *Implementing More Cost-Effective AP Processes  
and Gaining Control Over Procurement Elevates  
the Role and Impact of AP Staff Members*



#### The Challenge

In 2015, Ohio Shared Information Services began the process of migrating from their QuickBooks accounting software to a new ERP that would offer the company greater flexibility and set the stage for future growth and innovation.

According to Ohio Shared Information Services CEO Tom Shannon, the company chose Microsoft Dynamics GP to manage their business data. A successful ERP implementation led to exploring new and better ways to handle paper and digital documents, and automate the processes supported by their new ERP.

"As we grew as a company, the month end process became much more complex and required a lot of different spreadsheets to reconcile the different accounts," Shannon said. "It was really more about automating as many processes as possible and tightening down controls related to transactions."

Beyond gaining control over data and processes, Shannon also recognized that managing documents as part of the process was critical.

"There was still that paper side of things. So, our AP department would still typically have to do everything manually."

#### The Solution

According to Shannon, Ohio Shared Information Services chose to implement Dynamics GP along with the KwikTag enterprise content management system from ImageTag. As a result, OSIS would be able to handle their business documents in a way that was streamlined and more efficient. KwikTag's well established integration with Dynamics GP meant that OSIS could easily access relevant business documents within their ERP transaction records.

One key component in that decision was a third system that could integrate with Dynamics GP and KwikTag and eliminate the painful process of data entry and document



## OSIS

#### Client

##### Ohio Shared Information Services

Founded in 1999, Ohio Shared Information Services (OSIS) is a 501 c nonprofit organization whose mission is to unlock the potential of technology to positively advance outcomes in the modern age of community healthcare.

In the years since, OSIS has grown to become one of the few full-service Health Center Controlled Networks in the country. Serving Health Centers in 26 states, OSIS manages their own best-in-class data center, and have substantial expertise in the implementation and optimization of NextGen Healthcare technology products for Community Health Centers.

#### Industry

Nonprofit/Healthcare Technology Services

#### Needs

- Achieve better visibility and control over AP processes

handling. That system was docAlpha; an intelligent document capture and digital transformation platform, from Artsyl Technologies.

In support of Shannon's goal to OSIS's automate accounts payable processes, docAlpha provided the ability to intelligently extract data from their vendor invoices. docAlpha monitor multiple document sources, including email inboxes, scanners and fax machines, extract data from received invoices, then input the documents and the data into KwikTag automatically.

KwikTag then used that data and related documents, to automate invoice matching, approval routing and G/L coding. Integration with Microsoft Dynamics GP meant that at the end of the workflow, the appropriate transactions, with supporting documents, were all available in their ERP system.

docAlpha, integrated with Dynamics GP and KwikTag, provided the critical intelligent capture component, allowing Shannon and Ohio Shared Information Services to get even more value and performance from the ERP and ECM systems they've invested time and money in.

## The Results

According to Shannon, merging the capabilities of docAlpha, Dynamics GP and KwikTag has helped Ohio Shared Information Services to achieve a new level of control over their AP process, while maintaining or increasing efficiency.

Beyond simply supporting their existing AP process, KwikTag and docAlpha actually gave the OSIS AP team the flexibility to reinvent their process in a way that allowed for additional levels of accountability and control.

"With the new system in place, we can create process workflows that involve multiple people, with multiple departments and multiple levels of authority, without being over-burdened by complexity," Shannon said, "KwikTag and docAlpha keeps it simple for us."

- Automate and streamline AP invoice capture, AP data entry, routing, approval and ERP transaction creation

- Integration with Microsoft Dynamics GP & KwikTag ECM

## Solution

- docAlpha Smart Process Platform

- Integration with Microsoft Dynamics GP ERP

- Integration with KwikTag ECM

## Results

- Accurate automatic sorting, filing and indexing of invoice and related documents

- Automatic extraction and validation of relevant data from scanned paper and digital vendor invoices and related procurement documents

- Automatic matching of purchase orders, quotes and invoices to support the company's purchase requisition process