

## High Volume Electronic Document Workflow Improves Productivity in Property Management and Insurance Claims Processing

[Document workflow](#) is one of the single most productive software tools an organization can put in place to eliminate paper, increase speed of approvals, and track the progress of documents. It has the ability to route documents from the document creator, to reviewers and approvers, and back again. Electronic document workflow is most effective when combined with the secure, centralized document library of FileHold. Larger organizations use workflow in a number of ways such as invoice processing, purchase requests, travel expenses, and supplier and customer contracts. The [FileHold](#) document workflow module brings order to these processes in a transparent, dynamic, and robust fashion.

A workflow engine is designed to streamline the review and approval of electronic documents as they move through an organization. In collaborative work environments, this stage of review and approval is where the most time savings can be realized. The workflow component of FileHold allows workers to initiate a document workflow to send to any number of document “approvers” or “reviewers”. Reviewers and approvers are the participants in the workflow who are examining and possibly revising documents, or approving or not approving a document for something such as a payment or vacation authorization. The workflow also has the ability to add “Observers” who are only casually interested in the workflow processes, not actually completing any of the reviews or approvals. The software provides a complete audit trail of every action along the way and can authentic an approver’s [electronic signature](#) via a secure password.

To illustrate the importance and productivity gains realized from this feature, two FileHold customers were interviewed who have leveraged both the power of document management and the integrated workflow tool. FileHold wanted to gain knowledge about the technology infrastructure and the performance metrics of the installations. Both customers have high volumes of documents to process. For these customers, FileHold workflow is an absolutely essential technology in their daily operations.

### Property Management Company – Leases and Contracts

Like all large property management companies, this FileHold [customer](#) processes a very high volume of proposals, lease agreements, and many legal documents requiring their customers review and approval via an electronic signature. This complex work is done by a number of employees — many of whom do not have a lot of experience or well-developed software expertise — so the software must be easy to use. In this case, the customer prepared workflow templates that define the processes of the document routing for approval.

Their average contract size is 1.1 MB. In any month, this customer starts over 800 contract workflows and these documents are “touched” over 26,000 times by various reviewers and approvers. The workflows are relatively complex; one of their most common ones has 13 activities and multiple documents in each workflow. They have 136 enabled users of which on average about 20 are actively working on the FileHold system at any one time. This usage can go up to 40 concurrent users at peak times. Currently, this customer has over 68,000 documents in the FileHold library.

Some users access the system using the FileHold “web client” via a browser but most use the FileHold “rich client” desktop environment. To power the system, the server has 2 vCPUs and 8 GB of RAM. The SQL server has 4 vCPUs and 16 GB RAM. Storage is near-line SAS with RAID 5. Their server is hosted in the “[cloud](#)” at Rackspace and IT management is provided by a FileHold business partner [DocuSyst](#).

For such a high volume of document processing, customers are concerned about the length of time it might typically take to look up a lease document and put it into a workflow process for review and approval. FileHold asked this customer how long it took to look up and process a lease agreement. They said, *“Honestly, they both usually happen within a few seconds. Rarely do either take longer than that. When it does take about 10 to 15 seconds, it’s on approval and usually only after we just checked in the document. Both processes almost always happen right away.”*

### Insurance Company - Claim Processing

Claim processing is a very high volume document workflow activity. The claim documents themselves are not as large as a lease agreement and do not require as many levels of approval but the volume of claims can be very high. Most of the customer’s workflows only have one activity and one task but some have two of each. The ability to see the work in process allows the company to adjust staffing levels as the FileHold software monitors how long it takes to complete tasks and how many tasks need to be completed to process the claim documents on time.

An essential payoff to this customer for using electronic document workflow is the ability to immediately see an up-to-date status of a where a claim is in the approval process. When a provider or claimant calls to ask the status of a claim, the company can quickly and easily see where a document is and provide an approximate date of processing. Penalties for late processing can be large so being able to see a document in danger of being late can be prioritized to avoid penalty.

This customer initiates about 1000 workflows per day. There are approximately 90 users of the system and 6.5 million documents in the FileHold library. Searches are being performed on these documents all day long. In terms of performance, they report immediate response for initiating or approving a workflow. If a user has over 100 workflow tasks assigned, their task list takes about 5 to 10 seconds to load.

This customer’s system is installed on their own server and has been configured and is fully supported by a FileHold partner, DocuSys. Their SQL server has 10 vCPUs and 64 GB RAM. The applications server uses 3 vCPUs and 64 GB RAM. They also use NSAS with RAID 5.

By speaking with FileHold customers, it is clear that the FileHold document workflow module is a powerful tool that automates and audits business processes and improves productivity. To learn more about document workflow and the other capabilities of the FileHold document and records management software, register for a free public [webinar](#) . FileHold software helps organizations with their Information Governance and enhances the ability to “Go Paperless” .

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