

Case Study: State of Iowa's Alcohol & Tax Operations Division

Ricoh's DocuWare solution transforms manual workflows through digital document management

About our customer

The Iowa Department of Revenue (IDR), Alcohol & Tax Operations Division manages the sale and distribution of distilled spirits in the state and regulates and licenses all alcohol businesses. Over 2,000 liquor retailers in Iowa rely on the division for their wholesale liquor operations. As a result, their invoicing processes and workflows must be efficient to ensure payments are processed in a timely manner.

Challenge

- Reliant on physical mail and paper-based processes
- Time wasted on manually uploading invoices
- Inefficient workflows made keeping track of invoices difficult

“Ricoh has done an excellent job supporting us and identifying what our system needs to be completely self-sufficient. This was a big team effort, and we appreciate how timely and hands-on Ricoh was during the implementation period and beyond.”

— Jonathan Mader, Accountant, Iowa Alcohol & Tax Operations Division

Prior to our partnership, IDR's invoicing processes were manual and required employees to scan and upload physical mail containing invoices and other important documents. Invoices would be sent to the department in the mail or as emails to print and organize in folders and would then bounce around from team member to team member to sign and approve processing. This process quickly proved to be inefficient and team members sought to automate the process. They began by scanning paper invoices and creating a PDF to email to managers and supervisors for approval. After reviewing the PDFs, managers and supervisors would print the invoices to sign and scan for digital record keeping. While this was an improvement for team members, it could take several weeks to process invoices and keeping track of these documents in the workflow was difficult as documents were housed on individual computers and email networks.

Solution

- Implemented Ricoh's DocuWare solution to automate invoicing
- Specific email address created to electronically receive invoices
- Invoices automatically uploaded for approval
- Customizable interface and intelligent indexing to filing process

After analyzing invoice volume and processing, Ricoh recommended DocuWare to better manage invoice approvals among staff. With DocuWare, invoices are sent to an email address and automatically uploaded to the system to initiate steps for team members, managers and supervisors to get invoices approved. Regardless of format or source, documents are safely stored and routed to get approvals completed in a timely manner. As the organization moved to a hybrid work model, DocuWare supported that remote environment. This means documents can easily be accessed and managed away from the main campus while staying compliant with state regulations and standards.

Results

- Streamlined nearly all invoice processing through DocuWare
- Saved time by cutting out manual work to get invoices approved
- Now processing 300-400 invoices per month through the platform
- Reduced paper use office-wide

“We looked at other document workflow systems, but DocuWare offered everything we needed at the right price point. I immediately saw the benefits of implementing DocuWare, and it has been a major success for our organization.”

— Leisa Bertram, Bureau Chief of Operations and Finance,
Iowa Alcohol & Tax Operations Division

With the ease and simplicity of a digital document management system, Iowa's Alcohol & Tax Operations Division is enjoying tremendous efficiencies. Not only is processing invoices much faster but keeping track of each step of an invoice's journey, from receipt to approval, is much more transparent. Team members no longer waste time shuffling papers and emails to track down the stage of an invoice — with DocuWare, they can easily access the workflow of documents which are automatically routed to the right people.

The division has seen a boost in productivity among team members who easily adopted DocuWare and report that it has been intuitive and processing invoices is much easier. Bureau Chief of Operations and Finance Leisa Bertram describes that they “can get something done in a second [with DocuWare] that used to take 15 to 20 minutes.” Cutting back on paper-based processes has helped them get invoices paid faster and given team members time back in their workdays to focus on other important projects.

Ricoh's award-winning [DocuWare](#) is recognized as one of the best cloud and on-premises document management solutions on the market. It has helped over 15,000 customers, 650,000 users across 100 countries go paperless, and simplify work by digitizing, automating and transforming key processes. Learn more about DocuWare and how it can help your business keep information flowing.

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