

### Island in the Stream

Texas A&M University Corpus Christi uses Laserfiche to streamline BPP/FAMIS report distribution – saving time and money along the way

Texas A&M University Corpus Christi (TAMU-CC) is known as “the island university” because it’s surrounded by Corpus Christi Bay and the Oso Bay. But before implementing Laserfiche, the nickname could have just as easily have been applied because TAMU-CC was surrounded by a sea of paper.

Dennis Raulie, Manager of Administrative Computing Technology Services, recognized that the university had outgrown its existing document management system. He realized that what staff really needed was an enterprise content management solution that would comply with the university’s records management retention schedules, better secure documents and decrease the cost of handling paper.

Raulie saw a demo by Laserfiche reseller SMARTfiles and was impressed. **“Some document management systems didn’t fulfill our needs very well, while others just seemed rudimentary,”** he recalls.

Raulie also listened to what his users had to say about Laserfiche. “They liked the simplicity and speed. They also liked the ease of use and how powerful it was in being able to find information. **Laserfiche was also much more intuitive than what they were used to,**” he remembers.

With his users’ approval and confidence in Laserfiche’s robust functionality, TAMU-CC chose Laserfiche. Says Raulie, “With Laserfiche’s direct, accomplished and ingenious approach, we knew we’d be able to provide state-of-the-art service to our client base.”

After reviewing the areas that could be most improved in the shortest amount of time, Raulie focused first on development of a system to streamline the University’s BPP/FAMIS report distribution – a process that generates

a lot of information, and, in some cases, a lot of unnecessary paper. “The BPP/FAMIS feeds are mainframe listings that consist of several small ‘reportlets’ that are bundled into one file,” explains Programmer III Michael Williamson. These reportlets, Raulie adds, contain information that must be stored in Laserfiche as well as several pages of less useful information, such as security listings that are in some cases blank. “Some of these reports need to be seen, but don’t need to be kept,” he adds. “However, to the printer, it’s all the same. **All the reports would be printed when they came in, sometimes 60 data forms a day.**”

Some of these reports were thousands of pages long, requiring a ream or two of paper a day to print. This system, Raulie says, didn’t just consume time, it also consumed money. “The paper-driven report distribution system is very expensive when you add up the costs of printers, fax machines, paper, toner, storage for these supplies and storage for printed archived reports,” he says. “These paper reports are often copied and saved by individuals along the paper trail, which duplicates the expenses, too. So we knew if we could move the existing paper-driven report system into a digital form that would reap huge benefits.”

To filter the important information from the non-essential information, Raulie, Williamson, and Systems Support Specialist I Bobby Martinez took inspiration from Rube Goldberg’s legacy of creating seemingly complex machines to achieve simple tasks. **They created their own “Report Upload Bifurcation Engine” (R.U.B.E.), which processes continuous BPP/FAMIS report files, and splits them into individual reportlets as it does so.** R.U.B.E. then distributes the resulting reports and data into a virtual staging area where Quick Fields reads the data, Zone OCRs the documents and distributes the information into the proper folders within Laserfiche.

This is significant, notes Raulie, because R.U.B.E filters out the information that only needs to be seen but not stored. R.U.B.E. recognizes what data needs to be kept according to records retention demands and sends that information to Laserfiche, then sends the rest to Windows Share. The information is still available for viewing, but the reports do not need to be printed, thus saving more paper.

After R.U.B.E.'s initial success, **Williamson turned to converting TAMU-CC's legacy imaging data from its legacy document management database into Laserfiche through the "Legacy Image Translation Engine," the L.I.T.E. R.U.B.E., naturally.** Williamson wrote a custom process that accessed the University's outdated document management system and pulled the stored data and metadata, processing it through Import Agent and sending it into the corresponding folders in Laserfiche. "The old system was flat, with lots of template fields," Williamson explains. "It was not always useful and many end users did not know why these fields were being used." The actual process of converting all the old information into Laserfiche allowed Raulie and his team to collaborate with end users to reevaluate what fields were needed, determine which fields were most useful, and eventually add those to Laserfiche templates. In fact, Raulie says, this conversion process occasioned the same kind of useful re-evaluation and determination of template fields with each of the University's business units and their respective document types.

Change, of course, can be hard, no matter what kind of progress it promises. Raulie offers this advice deploying Laserfiche: aim for small victories at first to win internal champions to inspire organic adoption – not just demand it. Raulie targeted TAMU-CC's Accounting Department, where hundreds of data forms a day were printed, scanned and manually indexed by student workers, as a process ripe for improvement. Before Laserfiche, Raulie notes, it was considered acceptable to be a month behind in the filing because there was so much that needed to be done. **Since implementing Laserfiche and R.U.B.E., Raulie says, reportlets can be separated, converted, uploaded and placed into Laserfiche within minutes.** Not surprisingly, Accounting is no longer a month behind in its filing – instead, it is now working in real time. Even better, the department is now one of Laserfiche's biggest champions. "Get people like that comfortably productive and

enthusiastic," advises Raulie. "They talk about the success and the word spreads."

Adds Williamson, "When they see the light at the end of the tunnel, and they see their associates' success and what they can do, that speaks volumes."

Raulie also advises creating a test environment where users learning Laserfiche can experience the software at their own pace. "Build a 'sandbox' repository for users to play in and let them learn the controls," he says. "You can't learn to ride a bike unless you get on it, right?" Raulie also suggests obtaining administrative buy-in with regular progress updates. Soliciting department and unit managers for their input is also invaluable, he says, to increase group ownership of the project. "These are the team members who 'know the flow.' Their input is crucial." Updating administrators with reports of the success and progress of the implementation is also a key component. "It's not bragging if it's true," says Raulie. **"After a while, it begins to take on a life of its own, and individuals talk about the ease of use and time savings."** Lastly, Raulie advises developing a strong working relationship with your reseller like the university did with SMARTfiles. "SMARTfiles offers training videos and other training materials that we make available to our users," says Raulie. "Offer continuous training opportunities for your clients. If you think the price of training is too high, consider the price of ignorance."

For other IT developers interested in creating their own R.U.B.E. using the Laserfiche Software Developer's Kit (SDK), Raulie says that with prior knowledge of Visual Basic, developers shouldn't have any problems at all. **"In the hands of someone who knows VB, it should be a snap,"** he says. Williamson adds that it is easy to write code that formats legacy imaging data into the components required to drive Import Agent, so it can then distribute converted data into the appropriate folder.

TAMU-CC's future plans include automating and streamlining business process management using Workflow, with Bobby Martinez acting as project manager. It will bring its challenges and its success, but perhaps most importantly, it will continue to make end users happy users – like Payroll Manager Melissa Wright. When asked to sum up her success using Laserfiche, Wright simply replied, **"Laserfiche is easy to use. I LOVE LASERFICHE!"**

## About Laserfiche

A resource for more than 28,000 public- and private-sector organizations around the world since 1987, Laserfiche creates simple, elegant enterprise content management solutions that help organizations run smarter. From streamlining digital records management to automating the agenda process, Laserfiche helps improve efficiency while integrating easily within any environment.

## Your Next Step

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