

Teaching Old Docs New Tricks



Texas A&M University-Kingsville implements Laserfiche to solve its paper problems and automate business processes

Texas A&M University-Kingsville (TAMUK) knew enterprise content management was in its future in 2007 when its president, touring the campus, opened the door to a shower room in an old gymnasium—and found 70 filing cabinets of old business records. Needless to say, the oldest continuously operating institute of higher learning in South Texas needed a new, more effective way to manage its information.

A committee was promptly formed to review content management solutions. Ralph Stephens, Executive Director of Strategic Sourcing & General Services at TAMUK, knew that some of TAMUK's sister schools had turned to Laserfiche with similar content management challenges.

In fact, nearly 1,200 staff in 10 different departments and divisions within The Texas A&M University System's members were already benefitting from Laserfiche, including:

- Texas A&M University at Corpus Christi, to comply with records management retention schedules, improve document security and decrease the cost of handling paper.
- Texas A&M Health Sciences Center, to digitize all internal documents, reduce overnight shipping, eliminate office storage and improve document access and security.
- Texas A&M's Department of Entomology, to securely store digitized documents, automate business processes and eliminate the need for file cabinets.

Stephens spoke with colleagues about the benefits of using

Laserfiche and learned that Texas A&M AgriLife had also recently implemented Laserfiche to eliminate the need to print records and to automate document matching across 86 locations. The TAMUK committee contacted Laserfiche reseller SMARTfiles, which had worked with several TAMUS accounts, and arranged several demos to see how Laserfiche could fit their needs.

“So many records and copies were being created that security became an issue, especially for upper administration,” explains Vicki Bienski of SMARTfiles. “Sensitive information such as social security numbers and travel vouchers were being manually transported between offices.” Implementing Laserfiche would allow multiple departments to access and share information from a single, secured repository, rectifying confidentiality issues surrounding certain records while also allowing multiple departments to instantly access the information they needed.

The committee decided that Laserfiche was the right choice for TAMUK, with users across the board agreeing that the system was not only user-friendly, but also scalable enough to grow as needs changed. “Although we needed Laserfiche to solve our document storage issues, its breadth of capabilities also played a large part in our selection process,” explains Stephens.

Updating by Automating

Implementation began late that June and by the end of the summer, 15 employees in six departments were using the system, paving the way for campus-wide deployment that fall. Initially, the school chose administrative offices

to serve as beta sites for developing procedures, testing processes and eventually training other departments to use the system. The beta sites included:

- Accounting.
- Accounts Payable.
- Budgets.
- Human Resources.
- Physical Plant.
- Procurement.

Once the beta sites proved successful, campus-wide deployment began. A significant part of this expanded deployment was to change the scope of Laserfiche use from archival storage to day-forward capture of active business documents, the idea being to input, organize and access old and new files across multiple departments, all from Laserfiche. “We liked that Laserfiche could be a repository for any document—image files, Word documents, PDFs, e-mails— not only scanned images,” Stephens says.

To automate such a high volume of document capture and processing, TAMUK turned to Laserfiche Quick Fields, which pulls data from incoming electronic documents, to automatically create, sort and file records in the Laserfiche repository. Managing certain business documents like purchase orders or payment vouchers, however, required a more elaborate solution.

Utilizing FabSoft Integration to Optimize Functionality

While Quick Fields could easily scan documents and file them appropriately from the university’s legacy system, those records were then sent to the University College Station remote mainframe, where information is electronically housed, before they were sent back to TAMUK and printed—up to a staggering 4,000 pages of vouchers and purchase orders a day. In order to eliminate both the need to print such a large volume of paper, as well as to eliminate the extra steps it took to input this paperwork and deliver it to the departments requesting it, TAMUK worked with Laserfiche engineers to integrate FabSoft with Quick Fields to create detailed electronic forms unique to the information at hand.

FabSoft places the print data from the mainframe system onto a new form, and that key information is extracted by Quick Fields, then organized and stored in the Laserfiche repository. From there, TAMUK departments selectively print only the purchase orders or vouchers

they need, bypassing the remote mainframe. Response time to inquiries—both internal and external—has been greatly reduced. Multiple departments are able to access information simultaneously.

“We can quickly look up images of the purchase order or payment voucher and provide either copies or specific data elements in seconds rather than hours,” says Tina Livingston, Director of Budgets. “Previously, we had to go to file cabinets (sometimes in different offices), pull folders and make copies. Now, we look them up in Laserfiche and e-mail them to the customer.”

With such a successful integration of systems, Stephens says, “Several of the other A&M schools have expressed interested in following suit and implementing their own Laserfiche-FabSoft integration.”

Enterprise-Wide Results

Today, 200 users have access to Laserfiche, with approximately 45 users accessing the system on a daily basis—which is only 25% of TAMUK’s projected use. While TAMUK is saving on paper, labor, mailing and storage costs, the real benefit of using Laserfiche, Stephens says, has been in changing the mindset of TAMUK’s staff and administrators, inspiring the adoption of new ways of working.

“Laserfiche can do so much more than we first envisioned,” he says. “We’ve been able to expand it from a simple storage repository to a system that controls the workflow of our documents and maximizes efficiency.”

Though Laserfiche is now primarily used within Administrative Services and offices within departments, Stephens says that collaborative content management is the next phase—and TAMUK is looking to Laserfiche Workflow to drive it. “Workflow is going to be the real tool for efficiently managing documents between departments. It’s going to deliver huge benefits,” Stephens says. He predicts that TAMUK will see exponential growth in process change.

As for his take on the Laserfiche Run Smarter® Philosophy, Stephens offers this advice to new users: “For TAMUK, Laserfiche has been a business-process change agent—it showed us solutions to problems we hadn’t even considered before. Think of Laserfiche as an initiative, not just an application.”

About Laserfiche

A resource for more than 30,000 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

Please call **(800) 985-8533** or e-mail **info@laserfiche.com** for more information.

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