



## **Expanding Document Management from the Department Level to the Enterprise Level**

by Greg Rapport

Transervice Logistics Inc. provides total transportation management. They have over 38 years of experience in the transportation industry and are driven by the needs of their customers. They understand the customers' desires and deliver innovative services to meet those needs. Their goal is to provide the customer with professional service on the most cost-effective basis.

Some of their programs include fleet maintenance, routing, scheduling, reporting and tracking systems and maximum vehicle utilization. Each of their customers enjoys a specialized program tailored to meet their specific needs.

This flexible approach is a major contributor to their growth. Beginning in 1969 with under 100 employees, the company now employs 1,500 employees at more than 120 locations in 21 states and Canada.

That's today. A few years ago, with 1,000 employees, Human Resources AVP Gina Lydakos calculated that the HR file for each employee contained 30 pages, meaning they were manually keeping track of 30,000 pieces of paper, just in the HR department.

### **Start Departmental, Think Enterprise**

It wasn't just the fact that there were over 30,000 pieces of paper that drove Gina to seek a solution. The nature of the paper, medical files, I-9's, affirmative action documents, payroll records, etc., was such that many of the papers had to be kept separately for each person. So, in addition to the pure bulk of the paper, there was an organizational aspect that needed to be addressed.

Space was also becoming an issue. File drawers were full and blank forms decorated the tops of file cabinets and other spaces. Perhaps the biggest annoyance was when an employee would look for a file, not find it, and have to walk around the office to find out if someone else was using it. Walk-arounds cost companies countless wasted dollars in unproductive work-hours.

Gina had been discussing the problem of space and paperwork with CFO Eric Sklar who suggested the idea of document management. From the beginning, the two saw the value in launching document management in the HR department and progressively including additional departments throughout the enterprise.

### **The Search for the Right Solution**

Gina received the go-ahead immediately to begin the search for a provider and did most of the legwork online. First, she had to learn about the different types of solutions.

One type of solution was a web-based hosted application that Eric had suggested. With this application the files actually reside offsite on the host's server. This was vetoed when they discussed what might happen to the files if the host went out of business. Most host companies aren't that large and there is an issue of what happens if the company goes under. Who really owns the database? Would they have trouble gaining access to their own data? Both Gina and Eric felt more secure having their records onsite and in their control.

Another type of document management solution utilized a networked copy machine with scanning capabilities. Ultimately, they had trouble believing a solution based on the copy machine (hardware) would measure up to a solution based on software. It just didn't make sense, especially when they considered expanding from a departmental scale to an enterprise scale.

Since one of Gina's main priorities was ease of use for the employees, it wasn't difficult selecting Computhink as a possible provider. She liked what they had to offer. Computhink put her in touch with a reseller of the product in her area. A live demonstration was given that seemed to address this issue, but Gina still wasn't convinced. She needed to make sure this product was the right choice.

What finally put Computhink's ViewWise® Solution ahead of the pack were the references Gina contacted. Each highly recommended the product and confirmed the superior ease of use. With ViewWise meeting this core requirement, the decision was made to purchase and install a ViewWise Small Business Solution.

The original install and implementation took less than two days with the help of a regional consulting company.

### **The Paperless Office®**

Computhink calls their ViewWise Small Business Solution "The Paperless Office®" because it can transform a small business or a department from a paper disaster into a model of electronic efficiency.

The ViewWise "Paperless Office" or Small Business Solution is a powerful yet affordable document/image management solution that organizes and protects information vital to any business. It includes Microsoft SQL Server 2005 (Express Edition) as a database and comes standard with OCR, audit, scanning, MS Office integration and retention services. It allows for unlimited customized index fields and document types, comprehensive search and retrieval functionality, and is easy-to-use and administer.

In crafting the Small Business Solution, Computhink started with their feature rich ViewWise Enterprise Edition and built a simple, "out of the box", easy to install small business solution.

The result is the ViewWise Small Business Solution provides all the capabilities of the Enterprise Solution scaled for a small to medium enterprise or departmental environment.

The key benefits include:

1. **Immediate, Significant Operational Efficiencies**
  - Reliable, faster and easier retrieval of documents
  - Rapid and powerful search capabilities to locate relevant documents
  - More timely and accurate capture, paper truncation at the source
  - Simultaneous access to documents and records by multiple people
  - Elimination of lost and misfiled records
  - Natural integration with applications and environments
  - Enable electronic workflow benefits
  - Reduction of physical document storage space
  - Eliminate shipping/traveling costs and delays for remote access
2. **Regulatory & Legal Compliance**
  - Security, audit trails and usage tracking/reporting and accountability
  - Integration with 100's of electronic document types & streams
  - Ability to meet regulatory reporting and information handling and privacy mandates
3. **Strengthened Document Security & Integrity**
  - Multi-tiered security model plus document encryption
  - Document typing and metadata for records management

- Controlled access to information from anywhere, by anyone authorized
- Disaster recovery and backup are facilitated
- 4. **Rapid Return on Investment**
  - Affordable acquisition and deployment costs
  - Minimized ongoing cost of ownership
  - Cascading benefit streams from added applications leveraging initial investments
- 5. **Customer Service Improvements**
  - able to respond quickly and accurately by researching while customer is on the phone and to then interact further with the customer
  - able to electronically collect and track customer interactions for continuity
  - able to interact and exchange electronic copies of documents

## **From the Customer's Point of View**

In the context of such a feature-rich environment, the one feature that stands out the most for Transervice is the flexibility to set up file cabinets one way and then change them as the business needs change. IT Director, Mike Kwock, says "You envision your needs before the project begins. Then, it's natural for business processes to evolve and change. We were able to easily re-organize the cabinets and folders to fit the new criteria. ViewWise adapted easily."

## **The Move to Enterprise**

The plan was always to incorporate additional departments into the document management system. In preparation, Mike upgraded the ViewWise Small Business Solution to the ViewWise Enterprise Edition and migrated the system to larger servers.

"The best part of the upgrade and migration was that the Small Business Edition was completely compatible with the Enterprise Edition. No conversion or re-scanning was necessary. Changing server hardware, moving over 2.5 GB of data, and bring the system back up took only one evening," says Mike. This is because ViewWise is designed to grow as a business grows. There is no need to worry about migrating and re-scanning a database into a more powerful imaging system. ViewWise's scalable environment eliminated the need to migrate data.

While they were upgrading the software from Small Business to Enterprise, they added Accounts Receivable (AR) to the fold at the same time. Mike remembers AR experimenting with different ways to organize the cabinets before settling into their current routine. AR scanned all their paper from the beginning of the year, and continues to scan their documents today.

Next up was the Risk Management department. They handle insurance and claims and their paper load includes workers comp papers. "Each department has its own unique business process," says Mike. "For example, some departments are regulated by the Department of Transportation for record keeping such as logs and other documents that may have to be presented on request." The ongoing plan is to move the Accounts Payable department into ViewWise, and finally, General Accounting will come on board.

## **Return on Investment**

"ROI is reflected in the savings from not having to copy and file several versions of documents," says Mike, "It has allowed us to grow significantly without expanding staff and storage space; we can access our documents quicker and in many more ways. For example, Accounts Receivable use to copy and file documents four or five different ways (i.e. invoice number, customer, year). Now they scan the original documents using keywords to organize the search capability." The only documents kept in files are original source documents.

"No copies, fewer filing cabinets, less filing; everyone scans their own documents," says Mike, "Consequently, the workflow is smoother and no one has trouble finding a copy."

## **Moving Forward**

Mike is working on making ViewWise accessible from anywhere. Soon employees will be able to access documents from a PC anywhere in the world via the Web.

Meanwhile, Human Resources was recently challenged with the acquisition of new business in Canada involving the addition of 150 employees. This was no small task. However, by scanning and filing the documents as they came in, the larger task turned out to be getting the data.

## **Conclusion**

Since this project began, Transervice has grown from 1000 to 1500 employees. "That would have meant an additional 15,000 papers backlogged if we hadn't started when we did," says Gina, "Plus, we didn't have the space for 500 additional files at 30 pages each!"

Mike states, "ViewWise has proven to be a good investment. On a daily basis, our need to communicate directly with Computhink is minimal. Our consultant remains consistently helpful. Any glitches during expansion have been solvable. We're very happy to continue moving forward using ViewWise as the centerpiece of our document management system."

## **About Computhink**

Computhink provides best-in-class ECM solutions for secure information sharing and compliance, targeting small and medium size organizations. Using state-of-the-art technology Computhink solutions operate on a wide range of platforms, including Windows, LINUX and Novell. The ViewWise Product line includes Email Archiving Solutions for Microsoft Exchange and Novell GroupWise. Founded in 1994, Computhink has over 4,400 worldwide customers in government, financial services, education, healthcare, manufacturing and utility organizations. For more information on Computhink and its products go to [computhink.com](http://computhink.com).