The Cure for Paperwork Headaches

Written by Melissa Henley
2570 Views

Texas A&M University (TAMU) is one of the largest universities in the U.S., both in terms of enrollment and physical size. With nine system schools and two campuses, as well as a main campus with over 100 buildings on over 5,200 aces, TAMU faces a unique challenge in sharing information.

Relying on paper was an inefficient use of TAMU's monetary and staff resources. In addition, board requirements frequently limit the amount of office space to conserve space for classroom and labs, so space used for paper storage was at a premium. What little space was available could have been better used for professors' offices.

Beginning in 2004, different programs and departments within TAMU began investigating document management solutions, in order to more efficiently and cost–effectively share information—not to mention save space. Ultimately, they chose a Laserfiche enterprise content management solution to securely store paper, implement business process management and eliminate file cabinets.

Currently, nearly 1,200 staff in 10 departments and divisions within TAMU use Laserfiche Enterprise Content Management (ECM).
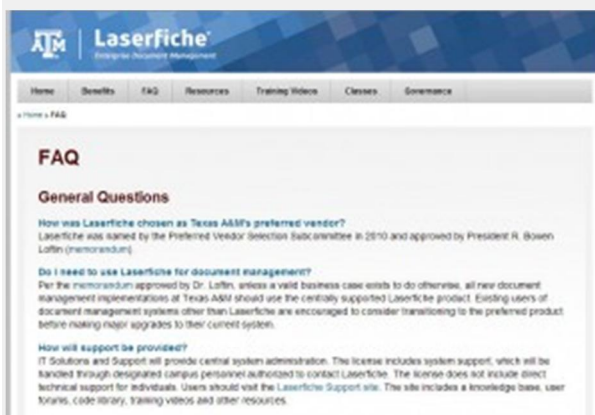
The Health Sciences Center (HSC) reaches across Texas to educate health professionals and researchers through its seven components: the Baylor College of Dentistry in Dallas; the College of Medicine in College Station, Round Rock and Houston; the Graduate School of Biomedical Sciences; the Institute of Biosciences and Technology in Houston; the School of Rural Public Health in College Station and McAllen; the Irma Lerma Rangel College of Pharmacy in Kingsville; and the College of Nursing in College Station.

When the HSC was planning to build its 200-acre new central campus, it wasn't planning on using space that could house students and labs to house file cabinets. Add to that a system that spanned the state and often required costly overnight delivery of paperwork to its central office, then a need to duplicate and store copies of that paperwork, and Laserfiche was just the cure Project Manager Kristin Nace was looking for.

Nace, the director for fiscal services, was formerly in the HSC accounts payable division. While working in that department, she scanned documents into a basic system that used a centralized network drive. In 2007, the HSC formed a committee to find an alternative system and a vendor to provide it.

Because of Laserfiche's successful implementation in the Texas A&M AgriLife program, it was considered for the HSC, and was ultimately chosen due to ease of use. Nace says that Laserfiche's interface is simple and self-explanatory, and the system's ability to import and export Microsoft Office documents was critical to its ultimate selection.

As in other departments, the HSC's implementation committee chose to implement Laserfiche in stages. The implementation began in the Finance Department, which includes accounts payable, payroll, human resources and the contracts and grants division and has 180 users. The Finance Department was chosen for the initial implementation because it is the number one paper consumer in the entire HSC.

Texas A&M established a website to help train and educate new users about Laserfiche ECM.

The HSC's Laserfiche ECM system was implemented on February 1, 2008, and was completed by May 31, 2008. During the implementation, staff were trained and the department established scanning requirements for their component offices. Nace was surprised at how easily the staff embraced Laserfiche, and how easily the implementation went. "Adoption was extremely easy," she says. **"When it comes to Laserfiche, I don't have to make anyone do anything."**

In fact, potential users approach Nace nearly every day and ask when they will get to use Laserfiche. Nace is also impressed by how her colleagues are constantly approaching her with new ways they can use Laserfiche to streamline their workflow. In fact, there is even competition between component offices over scanners, because everyone wants one.

The HSC implementation took place without IT support; in fact, IT staff only perform standard server maintenance. "Besides file structure and security, we're really using Laserfiche straight out of the box," Nace comments.

Since implementing Laserfiche, the finance office has quit accepting paper documents, and instead requires all internal documents, such as invoices, payroll documents and contracts, to be submitted electronically. **They have been able to eliminate most of their 69 file cabinets, which cost $2,100 annually to maintain.** And they have been able to adhere to their records retention schedule much more easily.

Even better, the department has eliminated nearly all their overnight shipments from regional locations. Previously, regional offices would overnight documents to the finance department on a daily basis. **Because 95% of these overnight shipments were internal, they are now handled electronically through Laserfiche—eliminating nearly $55,000 spent in shipping costs.**

"We've already seen a cost savings by reducing our overnight delivery charges for sending documents, which also translates into a smoother more efficient business process," Nace explains. "Utilizing Laserfiche security, we've moved to only having one copy of the document and are allowing our departments access to many of those folders – which they love because they no longer have to keep their own copy, which of course means fewer files in their offices."

Nace says an intangible benefit of Laserfiche is its ability to eliminate clutter from offices. She believes that employees are happier now because their offices are free from file cabinets and paper.

In the future, HSC plans to expand Laserfiche into Student Business Services (SBS). After the SBS implementation, stage three will be to implement Laserfiche in the

medical records department (MR). MR stores performance review files for doctors practicing medicine in the state of Texas, which are reviewed by other doctors to determine if they have the potential to become a malpractice case. Nace plans to use Laserfiche to redact sensitive information, and also plans to segregate them on a separate Laserfiche repository, to maintain security. She would then be able to give non-departmental users, such as doctors from across the State, access to only the specific documents they need to review cases.

Also, HSC has just received a land grant from the neighboring city of Bryan, and the state has approved construction for two buildings. One of the stipulations is that these buildings be used mainly for classrooms and research, so offices located on the new campus will have to be extremely small. In an effort to maximize available office space, the department head has already made Laserfiche mandatory for document storage.

In addition, the board has also approved the establishment of a campus in Round Rock. Like the Bryan campus, storage and office space will be limited, so a Laserfiche implementation is planned for this campus as well.

Nace has recently created a position to manage the expansion of Laserfiche into new HSC departments. Eventually, every department in the HSC will be using Laserfiche.

"Our largest unexpected benefit came in realizing how popular Laserfiche has become within our organization," she says. "I'm regularly getting requests from our departments to set up additional folders, processes, or even repositories. I knew people would love the product, I just didn't expect they would love it this much.

"In the planning stages I remember wondering what I was going to do if our departments didn't buy into Laserfiche," she adds. "How was I going to get them to use it? I'm so pleased to say they bought in after the first training class. As a matter of fact, I've not had to convince anyone to use it, if anything I cannot keep up with all of their requests to bring more documents into the system. We are excited it has taken off as quickly and easily as it has."

Melissa Henley Melissa is Director of Marketing Communications. She loves all things Laserfiche – especially the color orange! See what she's up to at @ECM_marketeer.