

How Organizations Use Enterprise Content Management to Drive Process Innovation



Bob Bloom, CFO of Heifer International, speaks about how ECM technology can be leveraged to save lives at the October 2015 Gartner ITxpo in Orlando, Fla. Refer to page 2 for the article.

Even the most innovative organizations rely on documents to get business done. Unstructured information such as paper and electronic forms, electronic documents, spreadsheets, PDF files and scanned images have an essential role in mission-critical processes.

Organizations typically implement document management software to:

- Reduce the costs associated with processing, printing, distributing and storing documents
- Reduce errors and delays by automating manual steps with workflow automation
- Retain documents for regulatory compliance and audit purposes
- Improve disaster recovery capabilities by archiving and preserving vital records

But leading-edge organizations have moved beyond simple document management. They leverage Enterprise Content Management (ECM) solutions to transform document-driven processes and accelerate decisions that deliver business results.

With capabilities ranging from document routing to records management, electronic forms and digital signatures, ECM provides many opportunities for business process automation, optimization and transformation.

Enterprise Content Management in Action

A Fortune 500 managed care provider uses ECM to dramatically accelerate the provider credentialing process.

The credentialing process verifies that doctors, hospitals and other healthcare providers are able to safely treat members of the managed care network.

Within one year, this transformative effort had:

- Increased average quality scores by 9%
- Decreased processing costs by nearly a million dollars
- Reduced turnaround time for application processing by 44%
- Improved security of information that is subject to HIPAA requirements¹
- Allowed doctors to start treating patients 18 days sooner

¹ One of the major goals of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) is to protect the confidentiality and security of healthcare information.

Leveraging Technology Transformation to Fight Hunger and Poverty



The rapid pace of technology innovation is transforming how organizations manage contracts and collaborate with customers, vendors and partners to drive business results.

Heifer International, a global nonprofit organization that has helped 25 million families, is finding ways to use technology tools alongside farm animals and crops to help fight hunger and poverty.

Heifer specializes in providing sustainable agriculture and commerce to impoverished communities around the world—and its operations depend on being able to quickly review, approve and access legal contracts.

“With a mission of ending hunger and poverty, leveraging technology for increased effectiveness and efficiencies is paramount,” said Bob Bloom, Executive Vice President and Chief Financial Officer at Heifer. “As we scale our impact, creating a digital platform with robust capability will enable us to direct more of our donor resources toward the small-holder farmer communities we work with.”

This includes deploying Laserfiche enterprise content management (ECM) so staff can quickly review, approve and access project-related contracts using Laserfiche electronic forms and robust workflow automation solutions.

Two document-driven processes Heifer has automated with Laserfiche are:

- Creating, reviewing and approving legal contracts across the enterprise
- Assigning legal counsel to a pending case based on its department or geographic region

Laserfiche has become a core component of Heifer’s domestic operations, but the organization also plans to use it to access information and facilitate processes from anywhere in the world.

“Our vision for Laserfiche is to allow all of our field workers, regardless of which country they are in, to be able to interact with documents, find records and submit forms—all from their mobile devices,” said Cedric Lambert, IT Director at Heifer.



“Helping just one family could take dozens of vendors, several government organizations, hundreds of legal contracts and extensive collaboration. This is where technology intervenes to save lives.”

Automating our internal business processes using Laserfiche is part of our technology transformation that enables our mission in fighting hunger and poverty.”

Bob Bloom
Executive Vice President
Chief Financial Officer
Heifer International



Heifer’s mission is to end hunger and poverty while caring for the Earth. For more than 70 years, Heifer International has provided livestock and environmentally sound agricultural training to improve the lives of those who struggle daily for reliable sources of food and income. Heifer is currently working in more than 30 countries, including the United States, to help families and communities become more self-reliant.

For information, visit www.heifer.org, read its blog, follow it on Facebook, on Twitter @Heifer or call 888.5HUNGER (888.548.6437).

From Risk Reduction to Enterprise-Wide Records Management System

Threats to business continuity force organizations to rethink their records management policies. Tompkins County, NY, was no exception.

Nine thousand boxes of the county's records were stored in a former library. At best, records took hours to locate—at worst, they were destroyed by water damage or lost forever in storage boxes.

After brutal storms hit the eastern seaboard in 2011, Tompkins County was faced with a choice: build a new storage facility or find a digital solution for its records management issue.



Tompkins County tackled its records storage problem first.

After exploring its options, the county selected Laserfiche and began scanning departmental records into its new electronic repository. The county's use of Laserfiche quickly expanded beyond records storage.

Today, 18 Tompkins County municipalities and 29 county departments use Laserfiche to manage records. This shared service initiative has:

- Enabled employees to quickly view critical documents on mobile devices
- Expedited public records requests in all Tompkins County towns, villages and cities
- Protected confidential medical information in accordance with the Health Insurance Portability and Accountability Act (HIPAA) through file-, folder- and user-based security
- Improved turnaround times for public information requests by maintaining documents in searchable, indexed repositories
- Mitigated the risks of future disasters and business disruptions through the use of geographically-dispersed backup servers
- Saved the county the \$5.5 million cost of building a new records storage facility

“ We needed an enterprise system. Our CIO had seen a demo of Laserfiche and thought it would work well for our countywide records management needs. ”

Maureen Reynolds
County Clerk
Tompkins County, NY



ECM Enables Automation for Greater Business Value

Organizations can drive innovation by leveraging ECM to automate document-driven business processes.

For example, Loudoun County, a fast-growing county in Virginia, has moved 1,500 users in 21 departments onto an ECM system that's integrated with 19 other software applications.

After creating a fax system integration for one department, the county's IT organization was able to quickly deploy the solution to multiple departments, streamlining fax processing across the county.

ECM enables organizations to simplify and consolidate processes that can be leveraged by multiple departments. Just a few of the processes that can be optimized through automation include:

- Case management
- Claims management
- Contract management
- Human resources onboarding
- Invoice processing
- IT network access requests
- Loan processing
- Records management
- Travel and expense management
- Vendor management

Although organizations may start with just one business process or department, ECM can scale rapidly throughout the enterprise to realize ROI in a short period of time.

“ When departments implement their own solutions, it leads to information silos and poor IT support.

We selected Laserfiche as our enterprise standard and started with departments that would see the benefits of digitizing paper and automating processes right away. ”

Jakub Jedrzejczak
Enterprise Imaging
Team Manager
Loudoun County, VA



Manage Records with Government-Certified ECM

To reduce the risks of non-compliance with recordkeeping requirements and interruptions to business continuity, organizations take advantage of Laserfiche's DoD 5015.2 and VERS certifications.

■ Department of Defense 5015.2 Certification

The DoD (Department of Defense) 5015.2 certification outlines the requirements for managing classified records and is widely considered to be the highest standard for records management and security.

These requirements¹ include the ability to:

- Assign metadata tags to electronic records
- Restrict the creation, revision and deletion of files, file paths and metadata to authorized users
- Calculate and assign retention and disposition schedules for individual records and folders of records

■ Victorian Electronic Records Strategy

Endorsed by the State Government of Victoria, Australia, VERS (Victorian Electronic Records Strategy) establishes a standard format for electronic records that focuses on data integrity.

Systems that are VERS-certified² must be able to:

- Show who created a record
- Show when that record was created
- Prove that the record was not subsequently modified

By achieving full compliance with VERS and DoD 5015.2, Laserfiche helps organizations manage documents from initial capture to long-term archival. Along with business process optimization, Laserfiche breaks down information silos and improves staff productivity while ensuring that information is accessed in a prudent and compliant way.

¹ Source: <http://jtrc.fhu.disa.mil/projects/rma/reg.aspx>

² Source: <http://prov.vic.gov.au/wp-content/uploads/2013/07/PROS-99-7-Spec3.pdf>

Accounts Payable and Receivable Processing: Avis Fleet



With the management of over 300,000 fleet vehicles, Avis Fleet is the largest fleet management company in South Africa.

The company has operations in eight African countries and has been named the Best Fleet Management Company in South Africa for nine consecutive years by PMR Africa.

Avis Fleet's finance department had manual accounts payable and accounts receivable procedures, which led to an average of 10,000 pieces of paper generated monthly.

The company grappled to match accounts receivable transactions with relevant supporting documents; employees had to log into multiple systems in order to process documents and view transactions. Additionally, Avis Fleet was not able to effectively track the progress of a paper-based customer credit facilities approval process, which created control weaknesses.

Integrating Laserfiche ECM with Sage X3 enterprise resource planning (ERP) software removed the need for data entry, printing and physical storage.

- Invoices are now directly imported into Laserfiche, keeping the documents secured while exposing the metadata through Sage
- Relevant supporting documents are stored in Laserfiche alongside the corresponding invoice and customer statement, creating a complete set of documents which can be easily delivered and shared with customers
- All actions can be completed with the Sage user interface without a user needing to return to Laserfiche

Ultimately, Avis Fleet automated the approval for 86,000 invoices dispatched each month, increasing security and transparency and reducing processing time by more than 20%.

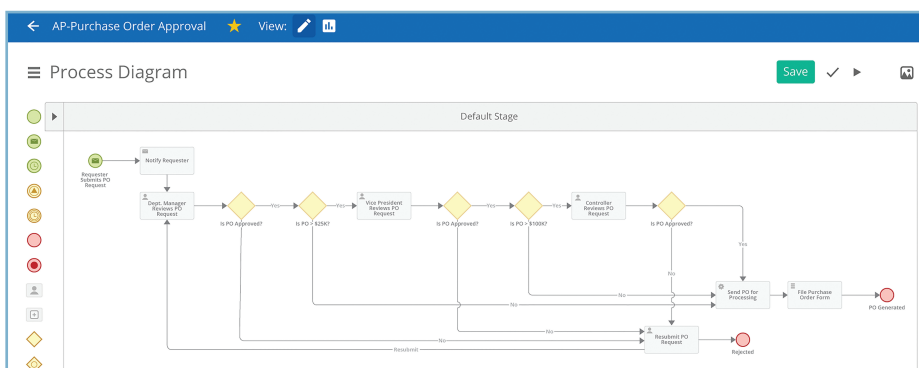
“Integrating Laserfiche with our ERP system has eliminated a lot of complexity out of processes like AP and AR.

We have seen significant gains in staff productivity and improvements to customer service.

This development was also the cornerstone to a fully automated Avis Fleet e-billing process, which will eliminate the need for paper documents entirely.”

Vincent Kelly

Team Leader, Development
Avis Fleet Services



Avis Fleet automated AP and AR processes to streamline approvals for 86,000 invoices received each month.

Human Resources Onboarding: Los Angeles County Sheriff's Office

The Los Angeles County Sheriff's Department (LASD), the largest sheriff's department and the fourth largest policing agency in the United States, provides law enforcement services to over 3 million residents.

With over 18,000 employees, LASD found it vital to improve its time- and paper-intensive deputy sheriff hiring process.

The hiring process, which had remained largely unchanged for 15-20 years, relied on the creation of a "jacket," a background file of over 1,000 individual pages. Managing jacket creation from around 5 million pages—submitted by over 10,000 applicants annually—caused issues related to efficiency, security and document retention.

Applicants would take from six to 18 months just to reach the primary approval phase. This phase required a jacket summary to be created by LASD and sent for a two-tiered approval process. Since LASD processed an average of 5,000 jacket summaries annually, typing this summary sheet alone took 20,000 hours.

Not only did physical documents need to be created for this process, but they needed to be transported and stored at an offsite third-party storage facility after year-end auditing.

By automating and transforming human resources onboarding with Laserfiche ECM, LASD:

- Drove the time-to-hire down from as long as 18 months by restructuring the process, eliminating inefficiencies and establishing parallel processes
- Used personalized email notifications to engage candidates throughout the hiring process
- Established milestones for reporting and process baselines
- Maintained security throughout the entire hiring process, including archiving and storing jackets for the appropriate length of time

"We needed to be able to create an open level of communication with our applicants, to help them become vested in not only law enforcement, but joining the Los Angeles County Sheriff's Department," said Captain Judy Gerhardt.

"By reducing our inefficiencies, engaging our applicants, and dedicating ourselves to a system that provides a competitive hiring time frame, we can continue to meet our goals of hiring the best."

“ Laserfiche is allowing us to not only function in a more streamlined manner, but also to focus on details that we never had time for or even imagined were options previously.

We set out to replace an out-of-date tracker and ended up reinventing what we do. ”

Andres Bilbao
Special Projects Deputy Sheriff
Los Angeles County
Sheriff's Department

Transaction Processing: Saudi Arabian Airlines (Saudia)



Saudi Arabian Airlines, operating as Saudia, is the flag carrier airline of Saudi Arabia. With offices on six continents, Saudia flies its fleet of 139 aircraft to 126 global destinations.

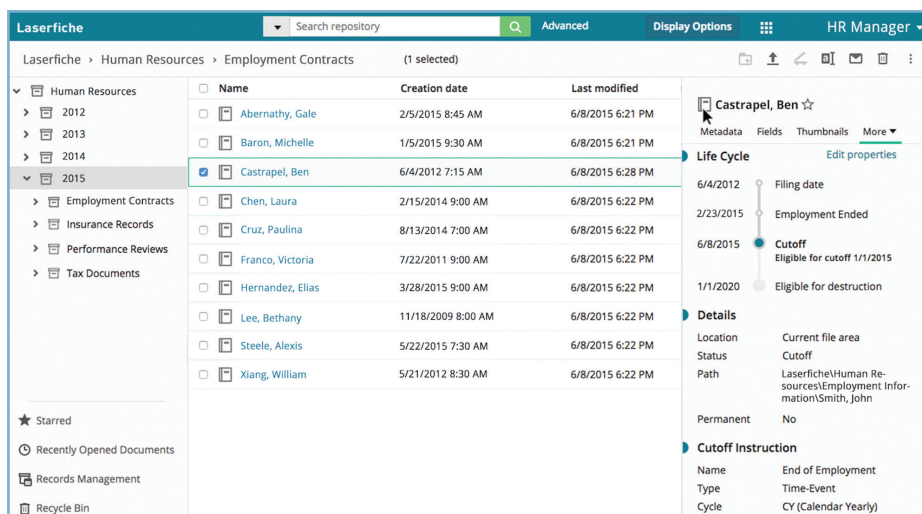
Saudia previously had separate departmental document management deployments, leading to information silos, duplicate documents and inter-departmental communication challenges. The outdated technology, limited functionality and lack of support led the company to seek out an integrated solution.

Saudia adopted Laserfiche as its ECM standard to:

- Facilitate collaboration across multiple offices
- Simplify document archival, search and retrieval using document registration numbers to reduce time needed to track documents
- Automate a paper-heavy process for handling financial transactions in the budgeting department, including managing approvals from multiple managers
- Maintain compliance with aviation industry requirements for pilot and flight attendant procedures

Implementing Laserfiche ECM at Saudia has led to a significant reduction in transaction execution time. The company is continuing to innovate other business processes and implementing Laserfiche across the enterprise.

“With the massive number of transactions and documents we deal with, Laserfiche has helped to improve work efficiency and expedite documentation follow-up,” said Abdulmonem Fallata, Manager of Integration and Web Competency.



Saudia uses Laserfiche ECM to reduce the time needed to track documents, improve efficiency and simplify customer follow-up.

“Laserfiche is a critical tool for corporate executive offices, as they rely on it heavily in their daily work.”

Muhammed Ali Albakri
Executive Vice President
of Finance and IT
Saudi Arabian Airlines

The ECM Value Proposition: Transforming Document-Driven Processes to Create Value

The value proposition for ECM is clear. It reduces costs and complexity by automating, optimizing and transforming business processes across the enterprise.

As organizations scale their ECM solution across the enterprise, they will improve workforce productivity, enhance customer service and collaborate more effectively with their vendors and business partners. Whether it's a nonprofit focused on fighting hunger and poverty, a local government providing citizen services, or a multinational corporation serving millions of customers, businesses will create significant value by innovating their document-driven processes.

In addition, Laserfiche ECM enables organizations to address regulatory compliance requirements through robust records management capabilities for audit and legal needs.

Empowered by accessible information, automated processes and streamlined records management, organizations reclaim value in each and every workday.



Ducommun Incorporated (NYSE: DCO), a leading aerospace and defense manufacturer and the oldest corporation headquartered in California, has used Laserfiche since 2007.

“We chose Laserfiche because we felt it will deliver the best value and ease of use for scanning, document management and workflow initiatives at Ducommun,” said Hovik Hacobian, Vice President of IT.

“Although we had an enterprise resource planning system, many of our accounting and finance processes still involved manual, paper-based processes. With Laserfiche electronic forms and workflow, we transformed how we process accounts payable invoices, expedite capital appropriation requests, and respond to bid and proposal requests,” added Hacobian.

“In addition, our Laserfiche reseller, American MicroImaging, Inc. (AMI), has been a trusted partner providing business process automation consulting, implementation and training to help automate workflows and continuously increase our return on investment.”

Your Next Steps



Contact Us
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