



Case Study Facts:

CLIENT: San Antonio Independent School District Federal Programs Department

DIGITECH SYSTEMS RESELLER: CASO Document Management

PROBLEM: Time-consuming document retrieval processes inhibited productivity and paper records storage space was running out

SOLUTION: PaperVision Enterprise

RECOGNIZED BENEFIT: Reduces time and labor needed for records management, simplifies information retrieval and alleviates storage problems

San Antonio ISD Saves 900 Hours Each Year with PaperVision® Enterprise

Every year, Eduardo Elizondo, Senior Director of the San Antonio Independent School District Federal Programs Department (FPD), had to call the district office and request more document storage space. The FPD office, located in a portable building, was loaded with filing cabinets, and a second portable building was stuffed full of archived documents. Storage issues were just the beginning. At the office, a backlog of paper records and time-consuming retrieval processes slowed production. Elizondo knew the team needed a better way to store and manage information.

Since implementing Digitech Systems' Enterprise Content Management (ECM) system, the FPD now effectively manages all incoming documents, simplifies record retrieval to save 900 hours each year, and they have eliminated their storage problems.

The Situation

With 54,000 students and 96 campuses, the San Antonio Independent School District (www.saisd.net) ranks third in student population among the 15 school districts in Bexar County, TX. The FPD manages all federally funded programs for the district and is responsible for processing and managing all requests for federal funds.

Each day, the FPD receives nearly 1,500 pages of purchase and payment requests from other schools and departments. Before the implementation of PaperVision Enterprise, three employees scanned documents and stored files on desktop computers that were consistently overloaded. The workstations would soon run out of memory space for new documents.

Retrieval processes were difficult. Paper documents took hours to obtain and electronic documents were not easily searchable or accessible. Slow retrieval times burdened the five-person approval process and auditing preparations. When auditors requested documents, employees needed as long as six hours to locate and retrieve them.

Additionally, the FPD maintains large documents called Title 1 Campus Plans. These records dictate how to allocate Title 1 federal funding and are the subject of many information inquiries. The department receives 50 to 75 calls per day that require employees to research documents. Some campus plans were stored in binders and others were stored electronically at workstations. As a result, the department typically took 24 hours to retrieve a campus plan and answer questions.

With each passing week, the paper backlog was larger, and the growing workload seemed to weigh heavier on the spirits of the FPD employees. "We had reached our breaking point," said Elizondo. "We needed a better system, and we needed it yesterday."

Knowing that schools have unique business needs, Elizondo went looking for an immediate solution that was proven in the education industry. He needed an ECM system with a price tag that wouldn't require him to go to the school board for financial approval—further delaying implementation. And, he really wanted a system that was easy to use.

Key Benefits

- Reduced time and labor needed for document management by 900 hours each year
- Cut audit preparation time by 92%
- Decreased document retrieval times enable employees to easily handle 75 calls each day
- Eliminated a 24-hour customer wait time for information requests
- Created a happier work environment by empowering employees to effectively do their jobs

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The Solution

Elizondo asked the district office about their student records management system and was referred to CASO Document Management, a Digitech Systems Value-Added Reseller. CASO performed an onsite analysis to evaluate FPD's needs and recommended a PaperVision Enterprise system to streamline their process and boost efficiency. Elizondo liked the PaperVision Enterprise technology, because it was affordable and easy to understand. Best of all, it could be implemented quickly. Plus, the student records department had experience using PaperVision Enterprise and highly recommended it.

In August of 2008, CASO installed the system and trained the FPD employees in less than a week. Today, all eight staff members save valuable time by effectively managing information.

Recognized Benefits

The FPD now handles information electronically and stays on top of all 1,500 daily requests. PaperVision Enterprise provides a single, searchable ECM system that facilitates retrieval and productivity for the entire team.

The time and labor needed to input and manage information has dramatically decreased. Three employees save 900 hours each year by effectively managing information. The new system saves the team so much time that they can now scan and input both all incoming documents and some old, archived records stored in the portable buildings. Before long, the department will be managing all archived documents electronically.

Now, instead of storing electronic documents on individual workstations, the PaperVision Enterprise system is connected to the school's server, simplifying the expansion of needed storage space.

When other departments call regarding Title 1 Campus Plans, the FPD can answer questions immediately and easily handle the call volume. "Now, we effortlessly retrieve information for other departments," said Elizondo. "Even when I have very little information about the document I am looking for, PaperVision Enterprise has flexible search terms that help me pinpoint records in no time at all."

"The PaperVision Enterprise system has been such a success that our implementation has become a pilot program for other departments in the district that are struggling with the same productivity and storage challenges that we were."

-Eduardo Elizondo, Senior Director of the Federal Programs Department

Previously, employees spent an average of six hours preparing documents for auditors, but now they spend 30 minutes or less. "Our staff members are much happier now," said Elizondo. "They don't have to waste long hours searching for records and shuffling paperwork." The department used to send paper copies of documents through the campus mail

system, but today they use PaperVision® Distribution Assistant to email documents.

Now, Elizondo doesn't worry about document retrieval, and he no longer begs for additional storage space. "PaperVision Enterprise is a perfect fit," he said. "We have an efficient system that keeps us ahead of our workload and saves us storage, time and money."

About CASO Document Management

CASO has been an innovator in developing practical, cost-effective imaging services and document management systems since 1994. With a management team that has more than 100 years of experience between them, they have a proven track record with even the largest commercial and government customers. CASO offers a full-range of imaging services or a comprehensive custom solution tailored to each company, industry or specific project. Their New York and Texas offices support hundreds of regional and national clients in government, finance, education, healthcare, manufacturing and other sectors. To learn more about CASO, call 888.388.CASO or go to www.caso.com.