

EASTERN CENTER FOR ARTS AND TECHNOLOGY

Leader in Technical Training Improves Document Access, Reduces Risk with ECM

The Eastern Center for Arts and Technology's (EASTERN's) primary mission is to equip its students with the skills they need to succeed in a career. EASTERN offers technical training programs in 14 unique fields, including computer network administration, construction and electronics, to students from nine school districts in eastern Pennsylvania.

Historically a forward-thinking organization that recognizes the relationships between strategic planning, information access and student success, EASTERN continuously looks for better ways to leverage technology for its students, employees and partners, including being one of the first schools (in the Commonwealth of Pennsylvania) to offer students, parents and participating schools Web-based anytime access to student information. EASTERN has also earned a reputation for high standards of fiscal integrity, including receiving perfect financial audits for its Business Office practices.

Despite its compliance and ability to share financial and human resources information among its employees using the SunGard Pentamation K-12 information management system, EASTERN found that the accompanying paper documents were consistently difficult to manage. Stored in inter-office file cabinets and an antiquated storage facility, documents including checks for payroll and purchasing, invoices, packing slips and all HR documents were not easily retrievable when needed, and made timely response difficult.

Additionally, EASTERN needed to find a simplified method for effective records management. After investigating several solutions, and propelled with references from other SunGard users, EASTERN turned to Harvest Technology Group Inc., an Authorized OnBase Solution Provider to implement an enterprise content management (ECM) solution.

Developed by Hyland Software Inc., OnBase is an integrated suite of enterprise content management (ECM) software solutions, including core capabilities in document imaging, electronic document management, workflow, COLD/ERM and records management.

ECM CONTROL OVER RECORDS MANAGEMENT MEANS BETTER SERVICE

Almost immediately after implementing OnBase, EASTERN was able to take its records management policies and truly implement a sustainable system that complied with the Pennsylvania Department of Education requirements and was easily facilitated by staff. Documents that must adhere to records management policies include student, human resources (HR), safety and financial aid documents as well as annual auditor's reports, financial reports and all financial records including account books, invoices, purchase orders (POs) and contracts.

EASTERN had a series of file cabinets to accomplish its records retention— nine file cabinets in the business office and an equal amount in HR. "Many employees have a need to access the documents, so the file cabinets were in a central location and provided access to documents that were less than two years old," states Ellen Ainge, bookkeeper at EASTERN. For documents that were older than two years access was considerably more challenging. The older documents were stored in a 20 by 30 foot storage room which, despite the frequent staff access to obtain documents, did not lend itself to easy document retrieval.

ECM ... At a Glance

Enterprise content management (ECM) solution enables a leading provider of innovative technical training to improve response agility with instant document access, increasing the ability to focus on strategic organizational goals that provide the best service to constituents.

Benefits

- Leverages document management technology and back office solutions that support records management and disaster recovery
- Improves data management with single repository
- Decreases response times for auditors, vendors, employees and students
- Provides interoperability with eFinancePLUS, making checks and other financial documents instantly available to any authorized user, right from their desks
- Avoids information silos and excessive IT administration with enterprise standard
- Eases document access in with intuitive Windows®-based user interface
- Allows multiple parties to view documents simultaneously
- Ensures documents are filed correctly
- Eases access to all student records and financial aid supporting documents through a single electronic repository

Application

- Accounts Payable
- Human Resources
- Records

Complimentary Product Integrations

- Bottomline Technologies e.Comintegrate™
- SunGuard Pentamation eFinancePLUS

"It was a horrendous task to find documents in the storage room...and even more horrendous to re-file them," recalls Ainge. Increasing the frustration of having to interrupt daily work to go to off site storage and tediously locate a specific document, the manual method of filing and re-filing documents relied on a common understanding of filing methodology that could easily be misinterpreted, leading to inadvertently misfiled documents. Also, a needed document could be missing or checked out by a co-worker with no audit trail.

"With OnBase, the ability to retrieve documents is so much easier," Ainge notes. Documents are now instantly available to authorized users when they are needed, regardless of how long they have been in the system. All documents have an audit trail which lists all actions that have been taken, including a history of who has viewed, printed or e-mailed the document. Documents are scanned into OnBase and indexed according to business rules already in place and meet records requirements to include metadata such as author, creation date, file type and description.

Upon request of an auditor, student, vendor or board member, documents can instantly be retrieved and viewed, printed or e-mailed, even while on the phone during the initial conversation. Employees no longer have to suspend a conversation to hunt through hundreds of files for a needed document. Because EASTERN had its records management policies and business rules mapped out, the electronic documents follow established rules and can never be lost.

HR AND BUSINESS OFFICE RETRIEVE DOCUMENTS INSTANTLY WHEN NEEDED

In the business office, the OnBase solution includes interoperability with e.Comintegrate from Bottomline Technologies. Images of checks for payroll and purchasing are automatically imported into OnBase as they are processed, enabling staff in the business office real-time access to check images along with supporting POs, invoices or time sheets should any questions arise.

Future plans for the business office include OnBase integration with eFinancePlus that will enable EASTERN to open OnBase documents as well as automatically store required state and federal regulatory reports run from the eFinancePlus system directly into OnBase for retrieval by any authorized staff member.

In addition, employee records are maintained in OnBase, allowing staff to instantly respond to staff issues with all supporting documents at their fingertips, shortening the amount of time spent on administrative tasks and freeing staff to focus on higher value tasks.

HR documents are consistently indexed and organized accurately in OnBase, enabling staff to have instant access to a complete employee record from one central repository. Because many documents are cross-referenced to other documents, the staff can instantly retrieve supporting documents with a simple mouse click.

For more information, visit www.harvesttg.com.

"We had a sound concept for records management, but with all of the documents in paper form, the records management policy was much harder to practice,"

remembers Terri Giambrone, EASTERN's business manager.

The enormous amount of paper accompanying federal financial aid and grants will no longer engulf the organization. Even large documents sets with lengthy retention requirements are easily stored in OnBase and easily referenced when needed.

Multiple users can access the same document simultaneously, improving collaboration and eliminating the issue of searching for documents that have been checked out by another user. In addition, because document access is limited dependent upon user group, employee and student privacy is always protected.

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DISASTER RECOVERY STRATEGY REDUCES RISK FOR CRITICAL DOCUMENTS

The primary and secondary disk group design of the OnBase solution inherently meets EASTERN'S requirements to have a disaster recovery solution that provides more stability than a paper or microfiche solution. Even if the primary document were to become unavailable due to hardware failure or natural disaster, OnBase enables real-time access to secondary copies, providing the ability for EASTERN to continue operations without a gap in service.

USER GROUP COMMUNITY FOSTERS BEST PRACTICES, SUPPORT

The OnBase community of users, accessible through <http://users.onbase.com> and the OnBase User Newsletter, have enabled EASTERN to adjust their system and learn about best practices with very little time investment. "We've really taken advantage of the OnBase Webinars and the users newsletters to get to know what is available to us," notes Giambrone. As a result of the dramatically improved access to documents, as well as the conscious effort to implement the OnBase solution to be as seamless as possible, the user feedback has been very positive. "It's just so easy to use," affirms Giambrone, "100% of the staff in the business office and HR use OnBase on a daily basis."