

# New York Credit Union

## Small Credit Union Sees Big Improvements With DocStar

### Company Facts

#### Overview

- ▶ Location: Albany, New York
- ▶ Industry: Financial Services

### Success Highlights

#### Challenges

- ▶ Growing amount of paper files was taking up valuable office space
- ▶ Paper filing process was slow and tedious

#### Solution

- ▶ DocStar® Enterprise Content Management (ECM)

#### Benefits

- ▶ Saved employee time as filing process became significantly faster
- ▶ Eliminated hard-copy clutter and repurposed storage space
- ▶ Protected important files from loss or damage on backup disks



New York Credit Union is a small credit union formed for the teachers and employees of the State University of New York. Their volume of new documents was roughly 70–90 multiple-page documents a day.

### Application

NYCU purchased the DocStar solution with a second optical drive to perform disk backups. They implemented DocStar ECM to copy, store, and retrieve documents such as cash receipts, vouchers, register receipts, journals, deposit records, and loan documents.

### The challenge

Before implementing DocStar ECM, NYCU used traditional filing methods to store their hard copy documents, which ranged in size from 3.5"x5" to 8.5"x11". Each day the documents were gathered, paper clipped together, then filed, while small slips and receipts were placed in envelopes for safekeeping. The files had to be kept for a federally mandated period of seven years, taking up an enormous amount of valuable office space.

The credit union was faced with two options—to relocate their offices to accommodate their storage needs, or find a space-saving electronic document management system. After analyzing their options, they decided that relocation would prove far more costly than purchasing a document management system.

## The solution

With DocStar ECM, NYCU is now effortlessly scanning and storing documents, and no longer needs to place smaller papers into envelopes and then into the appropriate files. They are also saving substantial amounts of storage space and employee time previously spent storing and searching for paper files.

## Benefits

NYCU staff can now retrieve documents within seconds, and backup disks ensure that important files cannot be lost or damaged. DocStar ECM also eliminated the need to relocate the credit union offices and the potential confusion and downtime associated with relocation of an office.

Two tellers and an administrative manager have walk-up access to the DocStar system, while a volunteer was added to the staff to implement the backfile conversion, which was estimated at 176,000–220,000 documents. Once the conversion was completed, all hard copy clutter was eliminated, and previous file space was used for other purposes.

Although a six-hour period was allotted for installing the DocStar solution, it was completed in a mere three hours. The initial training period for two tellers and an administrative manager took less than two hours.

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## About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.



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