

Research Foundation— City University of New York (RF-CUNY)

RF-CUNY Implements DocStar ECM to Eliminate Paper Burden, Reduce Costs, Improve Collaboration, and Increase Efficiency



Company Facts

Overview

- ▶ Location: New York, New York
- ▶ Industry: Education
- ▶ Specialty: Research
- ▶ Number of Employees: 12,000
- ▶ Website: www.rfcuny.org/RFWebsite

Success Highlights

Challenges

- ▶ Desired an agile, feature-rich solution to handle large volume of paperwork
- ▶ Wanted to reduce demand for physical document storage space
- ▶ Needed to simplify and streamline document storage and retrieval for employees across locations

Solution

- ▶ DocStar® Enterprise Content Management (ECM)

Benefits

- ▶ Imported approximately one million documents from previous application into DocStar solution
- ▶ Integrated software with existing systems
- ▶ Improved search capabilities and user experience
- ▶ Enhanced security for human resources (HR) documents
- ▶ Increased operational efficiency



The challenges

Cut costs, improve efficiency, and reduce bottlenecks

The Research Foundation of The City University of New York (RF-CUNY) is a private, not-for-profit educational corporation chartered by the State of New York to serve The City University of New York (CUNY), the nation's largest urban public university. The RF supports CUNY faculty and staff who have received external grants from government and private sponsors by providing the administrative services for these programs.

Awards exceeding \$410 million include research in the natural and social sciences, training, job placement, curriculum planning, assessment, program evaluation, media production, and software development. Approximately 12,000 full- and part-time staff are employed by the RF annually and can be found in the laboratories, theaters, studios, libraries, and offices of CUNY's 24 colleges and professional schools, as well as at numerous off-campus sites.

The RF was created to offer flexibility and the capacity to quickly respond to a wide variety of conditions and changing sponsor requirements. The group provides direct administrative services for these programs to manage, negotiate, administer and ensure compliance with its many sponsors.

"Here at RF-CUNY we handle all the administrative functions associated with grants management so our researchers can focus on what they do best—research," said Renato Rodriguez, Assistant Director, Business Systems Analysis for RF-CUNY's Systems and Information Services Department. "We manage all aspects of grant management including human resources, payroll, legal, finance and purchasing. If a researcher needs to hire an employee or purchase equipment—we review and handle the transaction to ensure that it meets regulatory, sponsor, Federal and State guidelines."

“It was really important that our employees could learn, accept and use the system effectively within a short time period. DocStar met all of these requirements.”

—Renato Rodriguez, Assistant Director | RF-CUNY

With so much paper documentation passing hands, Rodriguez and his team knew they needed to improve efficiency for employees and management and started to plan for the eventual transition from cumbersome paper to digital documents.

The solution

A scalable, affordable, web-based solution that checked all the boxes

RF-CUNY had a legacy system to manage some of their documents, but it wasn't meeting their growing needs. “We needed a more agile and feature-rich solution to handle our volume of paperwork. Also, since we do a lot of our own in-house development, we needed it to integrate with our systems. With DocStar ECM's robust API capabilities we knew that seamless integration with our systems was possible.”

RF-CUNY also wanted to reduce the demand for physical storage space and make it easier for employees to store, access and retrieve documents from any location. The organization

selected DocStar ECM for its web-based interface, scalable implementation and overall cost effectiveness.

“A web-based enterprise content management system allows us to share documents quickly and effortlessly, and the total cost of ownership of the product was in line with our budget,” said Rodriguez. “We were also looking to gain efficiencies without drastically changing our current process,” recalls Rodriguez.

“We didn't want a product with a steep learning curve. It was really important that our employees could learn, accept and use the system effectively within a short time period. DocStar ECM met all of these requirements.”

The results

Reducing the paper burden

The first step towards managing their immense document load was to import the documents out of RF-CUNY's legacy system. “Getting the documents out of our legacy system into DocStar ECM was initially a challenge,” says Rodriguez. “But by working closely with the team at DocStar, we were able to accomplish our goal. The Professional Services team was extremely diligent, knowledgeable and accommodating. We worked closely together to solve many problems.”

“Our team set up their configuration and workflows, and together we imported approximately 1 million documents that were stored in the previous application,” said Rod Silvers, Professional Services Manager for DocStar.

“By working with Mr. Rodriguez as a close partner, we were able to address any issues and get them up and running with DocStar ECM in a way that met their unique requirements.” Rodriguez and his team saw immediate improvements once the documents were in the DocStar ECM central repository. “The user interface and search capabilities are

so much better,” said Rodriguez. “By scanning and storing our files in DocStar ECM we have seen a big difference in the visual clarity and quality of the documents; they are much easier to read, and we can find exactly what we are looking for since everything is indexed and searchable.”

Improving workflow and increasing efficiency

The Human Resources Department is successfully using DocStar ECM to scan, store and retrieve employee documents. These documents are stored securely in folders with restricted access. This security is further enhanced by the availability of audit logs for documents, which can be reviewed by HR managers.

Additionally, RF-CUNY is storing most project-related documents in the system—employee folders, contracts, invoices, correspondence and other documents related to grants are now centrally stored in one location, improving operational efficiency by giving employees controlled access to files anytime.

“The DocStar system's integration tools have had a terrific impact on productivity,” says Rodriguez. “Previously, we had documents like contracts that had to be sent back and forth for approvals and then scanned into the system. By utilizing DocStar's Web Services, we can now take documents from our in-house systems and store them automatically in DocStar ECM. We eliminated the need for the scanner in this specific instance and freed that employee's time to focus on the more pressing needs of our research teams.”

“Storing documents in a common repository allows multiple teams to view the same version of the document. Information is always up-to-date and accessible. Commonly performed searches can be saved so that users don't have to recreate them and sharing documents with external users is easy through DocStar ECM's email feature.”

Reducing maintenance costs

Since implementation, Rodriguez and his team have not only reduced their paper files, but have eliminated the time they previously wasted resolving issues they had with their old system.

“With DocStar ECM, we are enjoying much lower maintenance in terms of time and money,” says Rodriguez. “With our old system, we dealt with constant problems like the bad image clarity, inability to locate specific documents, failing processes and system downtime. Now we don’t have these types of issues. When a system works the way it should, it costs less to operate.”

Rodriguez also relies on quick support from DocStar should any issues arise. “Like with any software system, there are going to be times when you need support. These days our issues are few and far between, but I know that if I have a problem I can call DocStar and get help immediately. Also, I know that I can count on Professional Services, should I need to escalate an issue. There are always resources available to me at any time—If I have a problem, I can count on DocStar to help me resolve it.”

“The Professional Services team was extremely diligent, knowledgeable and accommodating. We worked closely together to solve many problems.”

—Renato Rodriguez, Assistant Director | RF-CUNY

Looking towards the future

While HR is using DocStar ECM to store all of its employee documents, RF-CUNY plans to build on the current implementation by using the solution for their new electronic HR Onboarding system. “The Onboarding system will collect and process all new hire and rehire documents electronically and then automatically store them in the system, completely eliminating the need for the current paper process. Once in the system, the HR department will continue to have the same secure access to employee records. Incorporating DocStar ECM with our new Onboarding system will make our entire process more efficient,” notes Rodriguez.

In addition, RF-CUNY has introduced a new homegrown system to their Legal Department, which is currently in the testing phase. “For each transaction that we process, we typically need supporting documentation.

With DocStar ECM, we can store these documents electronically, saving us significant time and streamlining our workflow. By centralizing document storage, we can improve interoffice communication and collaboration with our legal, procurables and grants management teams.”

By integrating their homegrown system with DocStar ECM, RF-CUNY has reduced the time their team spends performing routine functions; such as scanning, filing and retrieving records. The time previously required to coordinate contract approvals and access supporting documentation has also been significantly reduced. Rodriguez says the next step in his organization’s deployment of DocStar is evaluating the potential for broader document storage and increased integration with new homegrown systems.

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.

DocStar[®]

Contact us for more information on DocStar products and services

+1.888.362.7827 x2735 info@docstar.com www.docstar.com

The contents of this document are for informational purposes only and are subject to change without notice. DocStar, a division of Epicor Software Corporation, makes no guarantee, representations, or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. This document and its contents, including the viewpoints, dates, and functional content expressed herein are believed to be accurate as of its date of publication, May 2017. The usage of any DocStar products or services is subject to Epicor standard terms and conditions then in effect. Usage of the solution(s) described in this document with other Epicor software or third-party products may require the purchase of licenses for such other products. DocStar and the DocStar logo, are trademarks or registered trademarks of Epicor Software Corporation in the United States, and in certain other countries and/or the EU. Copyright © 2017 Epicor Software Corporation. All rights reserved.