

Non-profit Organization Speeds Service, Cuts Costs



Summary

The Milwaukee Center for Independence (MCFI) was bursting at the seams with paper documents generated by its programs and services for people living with disabilities and special needs. To improve efficiencies and cut costs, Concurrency helped MCFI deploy a KnowledgeLake solution on top of Microsoft SharePoint to speed information searches and cut back dramatically on the amount of paper handled by the non-profit organization.

The Milwaukee Center for Independence (MCFI) assists children and adults with disabilities and special needs to achieve a better quality of life. The non-profit organization, which has been in business since 1938, assists more than 8,000 families in Wisconsin's largest city with programs and services that include children's programs, employment training and placement, long-term care and behavioral health programs, various therapy services, and early intervention programs.

Over the years MCFI accumulated mountains of paper documents that were taking up tremendous amounts of storage space while making it hard for employees to access information.

"We had millions of case records and timesheets that we wanted to digitize to cut back on storage space. And we definitely needed better document management that included indexing and searching," says Drew Madelung, Enterprise Content Management and SharePoint Specialist at MCFI.

MCFI realized there was a pressing need to digitize its paper files to streamline customer service and relieve employees of the burden of digging through file cabinets for paper files. "Plus we are under very strict compliance laws for records," he adds. "Dealing with file cabinets made that process a lot harder." MCFI began looking for an effective enterprise content management (ECM) solution that would integrate well into the organization's existing infrastructure, including its Microsoft SharePoint intranet. MCFI considered a number of possible ECM options, such as OnBase by Hyland. "That was out of our price range," says Madelung. "It had more features than we could ever use, yet it did not offer an easy add-on for document scanning."

Solution

Working with Concurrency, a Microsoft Gold Partner, MCFI deployed a KnowledgeLake ECM solution in conjunction with Microsoft SharePoint.

"Our IT infrastructure is built almost exclusively on Microsoft products, so SharePoint would integrate easily," says Madelung. "We then evaluated the KnowledgeLake products and saw that by adding them to SharePoint, we would have a solution for our core ECM needs."

MCFI deployed KnowledgeLake Imaging for SharePoint, a scalable, comprehensive solution for searching, viewing, routing, and annotating electronic content. The organization also deployed KnowledgeLake Capture, which MCFI uses with Canon imageFORMULA DR-6030c high-speed scanners for digitizing its library of paper documents and loading them into SharePoint folders. It also uses KnowledgeLake Connect, which enables the uploading of common business documents, such as Microsoft Office files, directly into SharePoint.

The entire deployment, from initial planning to testing to live production, took less than three months. "Before tackling the main problem of case records, we deployed the KnowledgeLake solution to the department in charge of processing thousands of timesheets and invoices," says Madelung. "We set up a timesheet site and an invoice site in SharePoint. The process went smoothly. Our only issue was figuring out how to handle the vast amounts of data that we needed to scan and index in a very short time."

The KnowledgeLake solution is helping MCFI provide even better service for its clients by helping improve and accelerate internal business functions. Employees can search for information and access documents much faster than in the past. MCFI is able to digitize thousands of documents monthly, which eliminates the need for filing cabinets. It has also achieved costs savings by reducing its physical storage needs and the process of manually destroying outdated paper records.

- ▶ **Faster Access to Information** - As documents are scanned and uploaded to MCFI SharePoint folders, they are indexed using metadata such as author, customer, date, and topic. These keywords facilitate rapid searches for information. "With the KnowledgeLake products, our employees can now search in a matter of seconds through thousands of documents to find just the information they need, which allows them to serve our clients more efficiently," says Madelung. "For example, retrieving a timesheet in the past might have taken 15 minutes. Now it's done in less than a minute. The customer service associate does not need to leave their workstation to look on other employees' desks for documents because they are all in SharePoint. This allows the customer service associates to answer more calls."
- ▶ **Quick Scanning of Paper Files** - The familiar Windows interface of SharePoint combined with the intuitive KnowledgeLake software enabled MCFI to easily train several employees to assist in scanning and uploading thousands of documents. "We've been able to put multiple people to work in scanning and uploading the documents," says Madelung. "This lets us digitize a lot of documents very quickly. We process approximately 6,000 timesheets and 2,000 invoices every two weeks using both KnowledgeLake Capture and KnowledgeLake Connect."
- ▶ **Cost Savings** - The KnowledgeLake solution is also helping the organization's budget. "Because we no longer need to keep all of the physical space that we used to require for filing cabinets, we've been able to reduce our costs," says Madelung. "Plus we can put that additional space to better use. In the past we were looking to grow our team but had no space to add new employees in our current office. We were able to add space for employees by eliminating filing cabinets."

Organization

Milwaukee Center for Independence (MCFI)
www.mcfi.net

Project Location: Milwaukee, WI
Employees: 500

Organization Type

Non-profit organization.

Organization Profile

The Milwaukee Center for Independence is a community-based nonprofit organization offering programs for people with disabilities and special needs. MCFI has three campuses in the city as well as offices that provide specific services.