



## Industry:

- K-12 Education

## Applications:

- Human Resources / Personnel Files
- Finance / Accounts Payables
- Payroll / Time Sheets
- Notification of Absence

## The Problem:

- Increasing Storage Space Requirements
- File and Document Access
- File Upkeep & Management Costs
- Confidentiality & Compliance

## The Solution:

- FileBound On-Demand ECM Solution
- PSIGEN PSI:Capture Software
- Fujitsu Scanners
- Automated Indexing

## The Benefits:

- Freeing Up Office Space
- Security Compliance
- System Independence

*“Our FileBound Document Management Solution is so affordable; every school district needs to take a serious look at this technology.”*

Jason Olson  
Director of Human Resources  
Verona Area School District

## About the School District

**Verona Area School District** is the 36<sup>th</sup> largest school district in Wisconsin. They serve over 4,600 students with 1,093 faculty, staff and administration members. The district schools include a high school, two middle schools, two charter schools and four elementary schools.

## Business Need

The district has experienced significant growth which has led them to seek a document management solution to help with the storage and retrieval of their paper documents. The initial application focused on the Personnel Files within the Human Resources Department. Space was quickly becoming an issue with both current and separated personnel files taking up valuable office space. File integrity, security, confidentiality and compliance were all concerns of the department. Access to specific employee files was also a problem as principals routinely need access to their employee files which were centrally stored at the district's offices.

The business office had a similar concern for space as filing cabinets lining the walls were overflowing with paper. Furthermore, the process they used to copy check registers and attaching them to the supporting documents was inefficient and wasted paper and toner.

A final need was for the solution to integrate with their current school management system. Using an independent document management system protects their information, but also provides portability to work with other school management systems should the district decide to change solutions in the future.

### Solution

The Priton Group worked with VASD to develop a document imaging solution to meet their current needs while incorporating the ability to grow and adapt to their changing requirements. The solution would also need to efficiently scan and index the backfile of active and separated employee files while efficiently handling day forward scanning.

The final system consisted of PSIGEN's PSI:Capture scanning software, a Fujitsu *fi-6140* scanner and the FileBound On-Demand Enterprise Content System.

Document capture incorporates a variety of processes for creating hands free data entry scanning. Barcode recognition, mark sense reading, zonal OCR and database lookups are all incorporated into the scanning applications.

The initial scanning application consisted of personnel files within the Human Resources department. VASD needed to scan the backfile of active and separated files, but due to confidentiality concerns did not want to outsource the project. TPG worked with VASD to develop a hands free method for indexing the documents. Utilizing an employee database contained within their Lawson system, barcoded sheets were printed and placed as the lead sheet of each employee file packet. Separator sheets were designed to list each



of the 29 document types. Staff fills in the circle next to the correct document type and insert the sheet while they prep the documents. The PSI:Capture software reads the lead sheet with the unique employee number, automatically fills in the remaining index values of first, middle and last name, union code, user level and department through a database lookup. Document types are determined by reading the mark sense values on the separator sheets.

The Business Office scans their Accounts Payable files into the system. Following each check run, the printed check is placed in front of the supporting documents, batched with additional checks and documents and scanned. The software recognizes each check creating a new document. Zonal OCR reads the check number, check date and vendor number from the check. A database lookup fills in the vendor name.

System retrievals occur through the FileBound On-Demand system. Utilizing the index values established within the personnel files application, administrators in each school can access their employee files without seeing files from other schools. The system was also designed to limit access to specific document types within each employee file. This allows specific documents, such as

drug tests, to be viewed by only the appropriate managers.

### Benefits

An obvious benefit is increased office space due to the elimination of the physical files. Efficiency gains through the ability of principals to access their own employee files have reduced the dependence of district personnel for manually retrieving and distributing the information. Compliance requirements are also adhered to through the structure of the FileBound system. The On-Demand model allowed VASD to deploy the system quickly and with very little involvement of the IT department. Integration with the district's school management system allows users to access information directly from their Lawson screens. Finally, the separation of their documents from their school management system creates an easy transition should the district decide to change solutions.



700 Rayovac Drive

Suite 207

Madison, WI 53711

608-279-4088

©2010 The Priton Group, LLC. FileBound is a registered trademark of the Marex Group Inc. PSI:Capture is a registered trademark of the PSIGEN Software Inc. All other products and company names may be trademarks of their respective companies.