"They took the time to really understand the perspective of staff who were going to be living in the software everyday."

Kristin Woodard
District Accounting Analyst/ AP Specialist
Oconomowoc Area School District

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How the Oconomowoc Area School District Drastically Reduced Paper Files and Increased Efficiency

The Oconomowoc Area School District comprises five elementary schools, two intermediate schools, and a high school. As the District adds facilities and employees to meet the needs of an expanding student population, administrative staff are always on the lookout for ways to become more efficient.

When the District's document management software failed to meet their needs, they turned to The Priton Group for help.

Today, staff in the District's Business Office and Human Resources department have drastically reduced paper use, can access more digital files at their fingertips, and enjoy a more efficient process to handle a wide range of critical documents.

Challenge: How to reduce paper and reap the rewards of an effective document management software

Prior to working with The Priton Group, the District used a document management software purchased through a third-party vendor. But according to Kristin Woodard, District Accounting Analyst/Accounts Payable Specialist, "The software was expensive, hard to use, and wasn't helping us the way we wanted it to."

Solutions: Gathering valuable staff insights and providing expert software guidance.

According to Kristin, within just one year, The Priton Group has helped the District become less reliant on paper and function much more efficiently thanks to processes and solutions like these:

Conducting discovery sessions with users. Kristin says The Priton Group made a point to get actual users—not just IT—deeply involved in the software integration process.

Providing guidance on better-performing software. The Priton Group suggested FileBound Document Management Software, a tool that numerous school districts use with great success.

THE PRITON GROUP

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"We really wanted a system that would help us cut down on paper - and become more efficient in the process."

—Kristin Woodard, District Accounting Analyst/Accounts Payable Specialist

Delivering a seamless software integration process. FileBound has many great features. One, in particular, is that it integrates with Skyward, the school management software that the District uses.

"Everything that The Priton Group has installed for us functions great," says Kristin. "And if we ever have a problem, they always respond right away."

Results: Less paper, better organization, more efficient staff, and software with "endless" possibilities

With the new FileBound system and support from The Priton Group, Kristin says, "We're finally experiencing just how much smoother things can be when you can stop relying on paper."

More convenience and security with online forms. The Priton Group has helped the District develop online forms for numerous purposes.

Calling them "super-helpful," Kristin says these forms provide a secure and efficient way for District staff to obtain and store a variety of documentation. For example, the Business Office uses online forms for vendors' W9s and direct deposit authorizations.

Smoother onboarding. Those online forms also benefit the employee onboarding process. The District's PSICapture software automatically extracts information from WECAN employment applications and passes it to FileBound.

FileBound's workflow creates an offer letter and employment e-forms that are populated with a new employee's information. It then emails the forms for the employee to complete online.

"What's great is that FileBound automatically sends reminders to employees to complete the forms. HR doesn't have to hound them," says Kristin.

Easier access to past invoices and other files. Kristin says she and her colleagues can now use FileBound to find past invoices in digital form - not hunt for the paper version or wait on others to find them.

An affordable software without user limits. The District can now have an unlimited number of staff using the document management software (which wasn't the case with the prior consultant). Kristin says, "That's great because the more people that use it, the more efficient we can get."

Guidance for the future. "We now know the possibilities for FileBound are endless," says Kristin. As the District looks for more ways to reduce paper and become more efficient, The Priton Group will continue to offer insight, guidance, and technical support.

The Priton Group

Interested in transforming your school district's document

management processes and achieving results like these?
To learn how The Priton Group can help, set up an introductory call and we'll discuss your challenges.

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