

CASE STUDY



**Santa Margarita
Water District**

THE RESULTS

- Migration of 120,000 electronic documents was accomplished in less than three weeks
- Improved customer service
- Improved workflow
- Conservation and redeployment of personnel
- Faster/error-free processes
- Removal of productivity and process bottlenecks.
- Projected savings of \$250,000 over five year period

THE CUSTOMER

Santa Margarita Water District - provides water and wastewater treatment services to some 150,000 customers in South Orange County, California.

THE PROBLEM

Establish document storage and management environment for compliance and freedom of information access, high volume record-keeping and disaster recovery requirements.

THE SOLUTION

ACOM's EZContentManager automates document capture, indexing, archiving, and management, enabling browser-based access, management and electronic distribution.

Fluid Document Processes Rule at Water Company

As a public utility, the Santa Margarita Water District (SMWD) must satisfy the voluminous record-keeping requirements and mandated disaster recovery requirements of their four key departments. The District provides water and wastewater treatment services to some 150,000 customers in South Orange County, California.

They discovered and implemented ACOM's EZContentManager and now project savings of as much as \$250,000 over five years.

“Our fundamental criteria were that any new solution be easy to use, easy to install, easy to learn, easy on our iSeries resources, and easy to migrate...”

Management determined several years ago that their administrative, engineering, finance and human resources documentation should be consolidated into a single, easy-to-manage document repository.

To satisfy this need, they installed an expensive FileNexus system that proved to be prohibitively hard to use. Ultimately, they abandoned it and returned to the paper-based document storage and retrieval process. However, they were still saddled with an expensive five-year support contract.

Second chance

Impetus to revive the electronic document management initiative stemmed from the district's 2006 acquisition of two ACOM productivity solutions that enabled the district to begin implementing electronic document processes: EZeDocs/400, an electronic document solution, and EZPayManager/400, for generating MICR laser checks. With the elimination of many paper-dependent processes, IT management began considering how to revive the electronic document management and retention program.

A long-time user of ACOM's payment and document productivity solutions, they evaluated the company's new standard's-based EZContentManager system. Their research revealed that EZContentManager offered several distinct advantages over its competitors:

- Secure, remote document access via the Web
- Fast, easy implementation
- Direct integration with ACOM's document output and payment solutions
- Superior price-performance

“Our fundamental criteria were that any new solution be easy to use, easy to install, easy to learn, easy on our iSeries resources, and easy to migrate documents to the content management system,” says Gloria Geisert, SMWD Network Administrator. “Further, we wanted all storage and processing to take place on a dedicated Windows server with high level security.”

“Implementation and integration of the ACOM solutions for checks and forms had been seamless and pleasant, so adding another ‘module’ of their integrated document solutions suite was intriguing.”

"EZContentManager offered everything we needed at an affordable level."



The Santa Margarita Water District is Orange County's second-largest water district, providing water and wastewater treatment services to more than 150,000 residents and businesses in Mission Viejo, Rancho Santa Margarita, Coto de Caza, Las Flores, Ladera Ranch, and Talega.

EZContentManager has improved staff efficiency by about 25%, freeing up their limited internal resources for more important projects.

Getting started

SMWD's IT environment comprises an iSeries Model 9406-720 and a dozen Microsoft Windows-based servers, with about 100 users accessing the application software for accounting, billing and associated tasks. Administrative, analysis and engineering activities utilize Windows applications, accessing data residing on the iSeries.

Because the unused document management solution was still in place, the framework for file structure and security layers existed. In order to optimize the ACOM implementation specialists' on-site time, IT personnel configured the server prior to their arrival. A fact-finding program had identified the documents to be archived and also established search criteria, index fields and security procedures. Folder structure, security groups and users were set up in the EZContentManager user interface.

"Most of the initial migration was achieved with remote assistance from ACOM tech support," Geisert says. "We set up a test group for migrating the spool files when ACOM was on-site, indexing and archiving the balance after they left."

Altogether, nearly 120,000 documents were archived in only about three weeks.

Impact and potential

By converting their reports into electronic format, SMWD estimate that EZContentManager will save the District approximately \$50,000 per year... or \$250,000 over the next five years alone. No more paper copies of the 200 reports of 50 pages each; now they are provided electronically.

In addition to their efficiency gains and lowering their printing costs, the District really hit a home run upon realizing that the purchase price for EZContentManager was covered by the elimination of the previous system's support contract.

EZContentManager made their document archival process fast and easy. The solution quickly demonstrated its flexible capture capabilities, by enabling them to pull in files from the previous system, as well as from stored spool files on their iSeries, and various scanned documents.

According to Geisert, just as important as the direct costs are the indirect benefits of convenience, efficiency and security. These are real but not easily measured factors that impact the interleaved activities of the overall corporate mission. Among these are:

- Improved customer service and workflow
- Conservation and redeployment of personnel
- Faster and error-free processes
- Removal of productivity and process bottlenecks.

EZContentManager has improved staff efficiency by about 25%, freeing up their limited internal resources for more important projects. The finance department is exploring an end-to-end application to automatically link purchase orders, invoices, accounts payable checks and back-up documentation, virtually eliminating direct handling. Human resources plans to image all employment documents to enhance security and confidentiality. Engineering is examining the feasibility of linking stored drawings to contract documents as well as the creation of a web-based retrieval system.

"EZContentManager offered everything we needed at an affordable level. We are only now beginning to realize the power and breadth of the software, and we discover new opportunities almost daily," Gloria Geisert.

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