

Habersham County Schools has come a long way from its previous system of Microsoft Excel sheets and handwritten purchase requisitions. With Softdocs' Electronic Content Management solution, their finance department now saves itself a lot of time and mistakes.

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JASON TINSLEY
CHIEF FINANCIAL OFFICER

QUICK FACTS

- ▶ Softdocs customer since 2009
- ▶ First implemented in Finance

KEY PLAYERS

- ▶ Jason Tinsley, Chief Financial Officer

CHALLENGES

- ▶ A new accounting system led to the need for an integrated document management solution
- ▶ Time-consuming, manual purchasing process
- ▶ Issues with printed check layouts

SOLUTIONS

The Softdocs ECM Platform™

- ▶ Implemented Softdocs and a new accounting system concurrently
- ▶ Allowed for automatic AP matching and electronic document processing



HABERSHAM COUNTY SCHOOLS

HABERSHAM COUNTY, GEORGIA

Located in the beautiful foothills of the Appalachian Mountains in Northeast Georgia, Habersham County is a two hour drive from the Smoky Mountains and less than two hours from Atlanta via Highway 365.



Initially, Habersham County was only looking for an imaging solution. What they discovered instead was a platform of time-saving, electronic document management solutions and services that truly take daily business processes paperless.



In the summer of 2008, Habersham County just decided on a new accounting system and was looking for an imaging solution that would provide integration to the new system, to minimize the amount of paper produced.

After reviewing several vendors, Habersham County chose Softdocs for its proven integration capabilities with their new accounting system, CSI, now part of Harris School Solutions.

“So many people try to tell you they can ‘work with anything,’” commented Jason Tinsley, Habersham County’s Chief Financial Officer. “But we didn’t want to be anyone’s first time. Softdocs had proven experience and references—their products were designed to work with CSI.”

In addition to the well-established integration capabilities of the Softdocs ECM Platform, Tinsley says they chose Softdocs primarily for its enterprise content management solution.

“Their sales staff was able to accommodate both our timing and financial needs, which was a big deal for us.”

“The on-site demo they conducted made us feel very comfortable with the product, like it could easily be implemented and trained on,” said Tinsley.

“The user interface was a huge selling point as well. Softdocs had the best UI, especially for our users with limited software experience. We were confident that the content management interface would be easy to use for both our administrators and our end users.”

Habersham County implemented CSI and **Doc e Serve**, Softdocs’ Print Customization solution simultaneously, beginning a seamless integration between the two systems.

“As we were implementing, we had teams there from both providers, working with us and with each other to ensure everything worked the way it was supposed to,” said Tinsley.

Every purchase order, check or other document processed through CSI and printed with **Doc e Serve** was available in the content management solution from day one, allowing Habersham County’s users to electronically access previously printed documents immediately.

Purchasing and Accounts Payable

According to Tinsley, processing finance documents electronically has been an enormous time-saver for the department.

“Before **Doc e Serve** and CSI, we were handwriting our purchase requisitions on these pre-printed forms in the Finance office,” says Tinsley.

“Anyone who needed to purchase something would have to come to the Finance office, pick up the pre-printed form and fill it out by hand. Then they’d have to send the form back to our office, where we would have to re-key the data into an old software application.”

“The [old] software had no link to any other application or archive folder. We would then print the form, fax it to the vendor, copy it, and file it into a physical folder. There was no way to even see in the old software if there was a corresponding purchase order; we’d have to get up and physically search for the file, if we were lucky enough to find a note in the system,” says Tinsley.

Now, with **Doc e Serve**, users can simply print their purchase orders from CSI, and electronically send the document to the Finance office for approval. The requester and the approver can send any necessary copies, and upon approval the purchase order is also printed.

“When we start scanning old records we will be able to take advantage of even more that Softdocs has to offer,” says Tinsley.

“We will be able to electronically access any of our finance documents without having to dig through physical files. Everything we process in the future will be automatically filed and indexed in Softdocs, and will allow us to automatically match purchase requisitions to their corresponding purchase orders, invoices and checks.”

In addition to the purchasing processes, many other functions of the Finance office have been simplified with the addition of **Doc e Serve**. As part of Habersham County, Tinsley’s office is tasked with managing local business licenses and occupational taxes.

“We were using Microsoft Excel to manage this huge amount of data before,” says Tinsley. “All of the information we needed was in a spreadsheet, and we would copy and paste the mailing address and other important information into our documents. Everything from bills, payment receipts and actual licenses depended on the information we could get from this spreadsheet. It was very easy to make mistakes.”

As bills, receipts and business licenses are printed from CSI, Doc e Serve monitors the print queue and pulls the print data into a clean, customized document. Copying and pasting has been eliminated, as well as the possibility of numerous mistakes.

Check Printing

“Habersham County has been printing checks long before Softdocs, but the process was tedious and not without complications.” Our bank’s check scanner needed a very specific layout in order to read the checks and process them correctly, and we were never able to set up our printers exactly right,” said Tinsley.

Since implementing **Doc e Serve**, there hasn’t been a single issue from the bank with the check layout. “Again, we had both providers working together, working with us and even working with our bank to find a solution,” shared Tinsley.

“Softdocs gave us the layout flexibility we didn’t have before.”

When a new employee is hired and needs to sign checks or other documents printed through **Doc e Serve**, Tinsley said it’s been very simple to make the switch with the Softdocs support staff.

“All we have to do is give them a call and let them know we’re sending over the new signature,” he says. “They get the signature, upload it into our system and the new template can be used almost immediately.”

Future Plans

In the future, Tinsley and his staff are looking forward to getting their content management implementation completed to take their office paperless. He says they have been very satisfied with the quality of the entire Softdocs staff, from sales and implementation to training and ongoing support.

ABOUT SOFTDOCS

Softdocs is a privately-held software company focused on the development, implementation and support of enterprise content management, electronic forms and workflow solutions for the education marketplace.

With a next generation, fully browser-based platform, Softdocs’ solutions integrate directly with existing ERP solutions. Institutions are able to eliminate the need for paper-based records and processes institution-wide from student records, finance, human resources, and beyond.