

Already a DocuWare user, Federation of Organizations migrates to the cloud to automate workflows, create efficiencies and enable employees to accomplish their work remotely.



Michael Serrano, IT Director
Federation of Organizations, West Babylon, NY

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- Location:** USA
- Industry:** Non-Profit
- Deployment:** Cloud
- Department:** Accounting, HR, IT
- Integration:** Abila MIP Fund Accounting

Federation of Organizations provides health and wellness, housing and support services to individuals and families in NYC and Long Island.

A multi-service, community-based social wellness agency, Federation of Organizations provides health and wellness, senior and children's, housing and support services in Suffolk, Nassau, Queens, Brooklyn, Bronx and Manhattan. Federation had been using the DocuWare on-premises solution for almost 10 years, but utilized only basic capabilities. IT Director Michael Serrano wanted to review and further leverage the DocuWare solution. As a result, he learned about the increased functionality that would be gained by migrating to DocuWare Cloud. He educated the department heads and staff about how the cloud worked.

"I broke down the misconception that if software is not on-premises it's not secure," Serrano says. "Once I explained how information is encrypted and transmitted, everyone jumped on board."

Migrating to the cloud

Serrano developed a migration plan and the cloud solution went live in early April 2020. At the time, staffers were adapting to working from home due to COVID-19, but because they were already familiar with DocuWare, the transition was straightforward.

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"Since the staff had a core understanding of the processes, transition time was minimal," Serrano says. "Everyone acclimated quickly, and the tools DocuWare provides helped ease the stress." Federation also integrated DocuWare Cloud with its Abila MIP Fund Accounting software.

Automation streamlines workflows for remote workers

DocuWare's automation features made streamlined managers and staffers' key tasks. Now, most documents arrive electronically so there's less need for scanning. Employees can print electronic documents directly into DocuWare. The documents are then sent to a monitored folder that automatically distributes them into the corresponding DocuWare in-baskets. "This is one of the ways DocuWare enables us to accomplish the full scope of our work remotely," says Serrano. "Workflows run as efficiently as they did when we were all in the office."

Employees also appreciate the system's automatic notifications and reminders. Once invoices are ready for approval, the manager is notified by email. Before automated reminders, approvers would set aside some time to go over approvals, but distractions could cause delays. "Now managers receive an email alert and click on a link that brings

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them into DocuWare,” says Serrano. “This makes it more likely that they will approve documents immediately.”

Future features and workflows

With the success of the cloud upgrade, Federation plans to add new workflows and features. The organization is currently implementing its first electronic form for onboarding and offboarding employees, and plans to digitize the entire employee lifecycle. “For a not-for-profit organization with a limited budget that can fluctuate, relying on automation rather than expanding its workforce is crucial,” Serrano says. “The focus is on being able to retain and leverage staff and to give them adequate time to work on critical tasks,” he explains, adding that Federation will keep expanding its use of DocuWare. “I’m excited about what we’ll be able to accomplish with DocuWare by the end of the year. And in 2021, we can take the solution to another level.”

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