

Data security, automated workflows and DocuWare's easy integration into an existing software ensured that DocuWare delivered what this Town Clerk's Office needed.



Melissa M.Haacke, Town Clerk, Town of Oakfield, Oakfield, NY



"We use DocuWare across all departments with the exception of our zoning department. The ease and speed of document retrieval is a benefit we appreciate on a daily basis."

Town of Oakfield



- Location:** USA
- Industry:** Government
- Deployment:** Cloud
- Department:** Company-wide
- Integration:** Business Automation System

The office of the Town of Oakfield was established in 1842 and serves a population of 5,000 citizens. They needed a secure document management system with automated workflows.

Prior to their digital transformation, the Town of Oakfield and its government offices filed and retrieved its official documents and records manually. Keeping paper records required adding physical space, and the price quote to add a records retention room was \$300,000. Additionally, the record-keeping personnel relied completely on their senior council members to guide them as to what day/month/year certain documents may be filed by. This tedious and antiquated system based on human memory, needed to be replaced by a modern digital one.

Training for digital transformation

Installing and transitioning to DocuWare was straight forward according to Town Clerk, Melissa Haacke. Even though DocuWare built a custom-made program specific to the needs of the Town of Oakfield, the required training was minimal: daily users were scheduled for four hours of training while non-daily users required about two hours. Currently, DocuWare is used company-wide at the Town of Oakfield's government offices.

Five of the twelve on staff users use DocuWare solutions on a daily basis to access information, process applications and issue permits or licenses.

The advantages of electronic filing

The Town's office staff currently stores over 40,000 documents in DocuWare's electronic file cabinets. Approximately 300 new documents are scanned and stored each month. This includes records from the three town cemeteries, vouchers, and highway and inventory data. Given the volume of data that needs to be securely stored and retrieved on an ongoing basis, DocuWare Cloud offers the anytime anywhere access to everything the staff need, ensuring that all business processes can continue in an efficient and highly productive manner. By going digital, the town no longer needed physical space for record retention, saving over half a million dollars. "The most wonderful part about digital filing is that we didn't have to build a new storage facility," Haacke says. "Everything we need is easily accessible in the cloud."

Integrational capabilities and Intelligent Indexing are highly valued

Integrating DocuWare with Business Automation System (BAS), a system used by town clerks across the state, was a key factor in adding to the speed with which the staff embraced DocuWare solutions.

"The price quote to add records retention room was \$300,000. With DocuWare we don't need that extra space and so we saved even more money by going digital."

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The integration of the two software solutions allows the town clerk to create a voucher in BAS, print it directly in DocuWare and send it through an automated workflow in DocuWare to the town board. Once the town board have reviewed and approved it, the voucher is sent back to Haacke. The entire process is now fast, 100 percent paperless and fully automated. Another favorite feature is Intelligent Indexing, which instantly identifies the most valuable information on a document and converts it into well-structured data. Using machine learning technology, this intelligent feature remembers each document and user’s indexing preferences, so every capture increases its speed, accuracy and reliability, getting better and faster every time. “We own three cemeteries, totaling close to 5,000 graves,” Haacke says. “DocuWare lets us to keep all this info at our fingertips. It now takes me minutes to find plot info requested by the town’s residents.”



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