

SANTA MARGARITA WATER DISTRICT

**EZCM, EZeDocs/400 and EZPayManager/400
(iSeries and Windows platforms)**



The Company

The Santa Margarita Water District (SMWD) 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. SMWD must satisfy the voluminous record-keeping requirements and mandated disaster recovery requirements of their four key departments.

The Challenge

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 that supported:

- Document storage and management environment for compliance and freedom of information access
- High volume record-keeping
- Disaster recovery requirements

The Solution

SMWD knew that broadening the scope of their initial electronic document management initiative was the right thing to do based on the challenges they were facing. The district's previous acquisition of two ACOM productivity solutions enabled the implementation of 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 standards-based EZContentManager system. Their

Santa Margarita Water District Realizes ROI and Plans Future Savings

- ☑ Improved staff efficiency by 25%
- ☑ Significantly lower printing costs
- ☑ Realizing that the purchase price for EZContentManager was covered by the elimination of the previous system's support contract
- ☑ By converting their reports into electronic format, SMWD estimates that EZContentManager will save the District approximately \$50,000 per year... or \$250,000 over the next five years alone

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
- Competitive pricing

"Our fundamental requirements 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."

SMWD's IT environment is comprised of an iSeries 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.

The Results

By converting their reports into electronic format, SMWD estimates 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 price point. We are now beginning to realize the power and breadth of the software, and we discover new opportunities almost daily," Geisert says.



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