

## **Case Study #1 – Financial Institution Client**

### ***Problem***

In September of 2000, the Eugene, Oregon based Liberty Bank became aware of a significant problem in their loan department. The bank realized that their microfilm-based document imaging system was out of date. According to Ms. Toni Overton, the bank's VP of Information Technology, "The bank's microfilm system had become very unwieldy and labor intensive. Our equipment had reached the end of its life and needed to be replaced."

### ***Process Analysis***

The bank investigated several Information Management systems and awarded the records management contract to VPCI. Ms. Pattle and her team worked closely with the bank's MIS department, loan agents, and loan servicing department to design a document management system that would meet the growing bank's requirements. Ms. Marsi Smith, Manager of Loan Servicing said of the design process, "Making sure the system is designed to meet everyone's needs is very important so there's no need for changes later. VPCI did an outstanding job making sure the system meets our needs."

### ***Implementation***

Once the bank's workflow and new system was mapped out, VPCI worked hard to complete the conversion process in less than two weeks. "VPCI was very organized with their methods and project plans," Ms. Overton says. "I have been part of other data conversions, and there have always been horror stories. With VPCI, all projected dates and times were met and the entire project was completed in a timely manner."

Ms. Smith is very happy with the bank's new document management system. "Customer files are now available at any one of our 10 branches as fast as you can click your mouse. When a customer calls, we can pull up the documents they need while they are on the phone," she says. "In our old system, many times we weren't able to get the information we needed until the next day."

### ***Training and Technical Support***

After the system was installed, VPCI technicians thoroughly trained the bank's staff and were available when the bank ran into difficulties. "Recently, bank examiners needed some information and gave us no notice," Ms. Overton states. "VPCI had someone in our facility within 48 hours to burn the information to a CD so we could meet the examiners request."

"A short time ago our building was flooded," Ms. Smith says, "and our scanner was completely soaked. Ron Malliot of VPCI was here within minutes of our call, cleaning up the scanner and helping us to get the system back up to speed." Ms. Overton adds, "Everyone at VPCI will go the extra mile and will come up with whatever is needed to solve our problems."

### ***Results***

"I have recommended VPCI to several other businesses that are looking for Information Management systems," states Ms. Overton. "Their system has saved us a lot of time and money, and we're very happy with the end result."

## **Case Study #2 – Government Client**

### ***Problem***

For years, the government offices of Marion County, Oregon shared a well-known document management system with the city of Salem, Oregon. Over time, the needs of the two government entities expanded so that a shared system was no longer feasible. Early in 2003, Marion and Salem officials decided that each government agency should install and maintain separate document management systems.

During their investigation, Marion County administrators found that updating their records management system would require significant data and software changes. When the county approached the existing software company regarding the changes, they were presented with a data conversion estimate that ran well into six-figures plus a large sum for upkeep and maintenance.

County officials began looking at alternative information management systems to determine if a new system would save money and meet the county's needs. After a thorough investigation, Marion County awarded the information management contract to VPCI and LaserFiche.

### ***Solution***

VPCI worked very closely with the County's Records Management personnel to design a system based on LaserFiche software that would be suitable for all county employees. The system had to be designed to allow all departments within the county to share records quickly and efficiently.

Within 48 hours of the contract being signed, VPCI provided the County with a custom conversion utility that would move the existing propriety data into the new system. VPCI's Systems Engineers began downloading the data, and just two and a half weeks after the contract was signed, the County's data was converted and being moved into LaserFiche.

VPCI had the county's new LaserFiche based system in place a month ahead of the scheduled deadline, and started training the system's end-users. Several operators in the Sheriff's office were skeptical about the new system because of past promises that weren't kept and the sensitive nature of their records. The VPCI trainers worked hard to make sure everyone using the system was comfortable with the new solution and were fully trained to allow a seamless migration. The users were happy and at ease with LaserFiche by the end of the very first training session.

Marion County officials and administration is very happy with the county's new document management system. "The LaserFiche system VPCI installed was able to do everything we needed," a Records Administration official said. "With our old document management system, index changes would require hours of meetings and programming time. With our new LaserFiche system, indexing changes would take only about 10 minutes. VPCI did everything they could do to make sure our system worked as they described it."

### ***Bottom Line***

The new information management system installed by VPCI saved the county taxpayers a significant amount of money. When the project was completed, the final cost of the new system was thousands of dollars less than the original *data conversion* estimate from the "well-known" document management company. Everyone in Marion County Oregon is extremely happy with the new information management system installed by VPCI.