DocuLex™
Document Management Software

It Pays to Have DocuLex Archive Studio Do the Filing

From hair restoration companies to medical practices, Certa Data Corporation has been providing services to a plethora of organizations across the US since the 1980's, ranging in size from five employees to thousands. Functioning as a service bureau to its clients, Certa Data automates payroll, HR and time management for organizations, using a home-grown software called CertiPay. CertiPay enables Certa Data clients to plan, track and transform basic labor data into information that can improve workforce productivity and utilization of labor resources. CertiPay solutions integrate payroll, financial management and human resource packages, providing seamless data transport from punch to paycheck. As part of its service, Certa Data takes on all client paperwork to be involved in the automation process.

With growth and excellent customer service being the goal of most corporations, so too is it with Certa Data. As part of this initiative, Certa Data is continually evaluating how to grow the business efficiently and set itself up to take on more clients.

The Challenge

Certa Data's ultimate goal is to allow client managers and employees to focus on more value-added activities, proper accounting and productive employee time. Prospective clients look to Certa Data for advance applications of complex business rules, enabling audit trail capabilities and critical information tracking. As a service provider, Certa Data, using the CertiPay software solution, automates for clients preparation of timesheets, time cards and other tasks associated with payroll that were previously performed manually. As another part of their service, but not part of the CertiPay automation solution, Certa Data houses all tax documents for clients associated with the payroll process, and provides customer access to quarterly and year-end tax information.

As mentioned, tax document automation is not part of the CertiPay software solution, and this has posed a significant challenge for Certa Data as the information provider. All client tax files collected and housed by Certa Data are hard copy, and much of this paperwork consumes valuable space at the Certa Data main office.

"Frequently, clients will request information from a tax file, and until recently, we had only one way to find that information – by hand," stated Scott Schwarb, Director of Operations at Certa Data Corp. "We discovered that many things had been misfiled, resulting in additional time and expense for retrieval, not to mention, once located, the cost of sending the information to the client in hard copy. With tax files containing so much sensitive information, it is important that we are able to locate any part of any file quickly, and reassure the customer that their tax information is being guarded. With growth of our company a major goal, we knew we needed to find a way to securely convert and manage our client tax files in a digital format – we couldn't keep digging through all that paper while adding even more. An electronic solution would not only save us time, money and real estate, but would also ensure retention and protection of these files in the event of a fire or natural disaster."

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The Solution

Certa Data chose Archive Studio™ by DocuLex to tackle their tax file conversion project.

Said Scott, "We knew we needed a solution that was secure, simple but customizable, a package we could own in-house, and something we could ramp up quickly to start the conversion process. We researched other products and they were all proprietary. We needed to know that whatever solution we chose, that it would remain intact, even if the company that created it went out of business. Archive Studio by DocuLex offered all of these things and more. We had no fear of it becoming obsolete."

The Archive Studio software package features various components, including Goby Capture, Goby Profiler, Goby Monitor and WebSearch.

Using a Kodak ScanStation 100 for centralized scanning by one person, Certa Data, with the expert help of DocuLex, combined the scanner's capabilities with the Archive Studio package for fast capture, management and delivery of their tax document backlog.

The Goby elements of the Archive Studio package offer convenient scanning, indexing, archiving and document delivery capabilities. The Profiler catalogs scanned documents with custom index metadata and custom file names per Certa Data's specifications, using a specially designed profile sheet for each batch of documents. The Monitor, working on the Certa Data server, then grabs the scanned image files, OCR's them and electronically files a fully searchable PDF according to the profile sheet specifications.

For fast retrieval and delivery, Certa Data employs the DocuLex WebSearch™ product, a content management software developed utilizing Web 2.0 technology, for use on the back end of the capture process. After Monitor has automatically filed the scanned and fully searchable PDF tax documents according to the Certa Data profile sheet specifications, WebSearch enables fast search and retrieval of these documents for client request fulfillment. Additionally, WebSearch meets Certa Data's security requirement for their confidential customer tax files by offering login authentication and options for setting departmental and document level permissions for file retrieval requests.

The Results

With the DocuLex Archive Studio solution, and an employee scanning just a few hours per day, Certa Data has already converted over two years of tax files for its clients since installation in October 2007. Multiple shelves and filing cabinets now stand empty, freeing up much needed space for other, more productive types of company growth.

"Ramping up with the Archive Studio solution was easy," stated Scott. "The service provided by DocuLex exceeded our expectations. They clearly demonstrated the flexibility and capabilities of the product, then worked hand in hand with us through installation, to the creation and customization of our profile sheets, and finally to answering questions that would come up after starting production. Furthermore, with the previous hard copy filing system, documents had become very hard to track. With the Archive Studio solution, we can search and find anything in an instant. The WebSearch feature, a 100% browser-based application, offers so many ways to locate a document – we can even find things searching with a single letter. Although we are currently using the software for our tax backfile conversion, we can now see that it will not be long before we can use the very same application for Certa Data's Account Payables and Receivables. The bottom line is we purchased a modern, market ready application that is simple and easy to use. It has helped speed along our client offerings, plus those darn filing cabinets were expensive!"