



AAPA 2012 Finance Seminar

Enterprise Document Management Solution

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Background

- 126 Employees on staff
- Implementation did not include operating company (VIT)
- Driven by ISO 9001:2008 compliance goal
- Setup of company intranet was the start (2008)

SharePoint v. File Server

- SharePoint keeps content secure while still allowing access from anywhere
- Provides collaborative features
- Enterprise search capabilities
- Even individual documents can have their own security in SharePoint
- Provides some (limited) Records Management capabilities

How the VPA was using SharePoint

- Intranet portal for the Organization
- Document storage on SharePoint sites (primarily “forms” and “documents” but not “records”)
- Communication of company information to employees
- Policies and procedures (including ISO 9001:2008)
- Effectively: SharePoint is our collaboration portal.

Paper, Paper EVERYWHERE

- Extensive collection of printed documents, warehouses full even!
- No end in sight for production of paper records
- Documents printed from SharePoint and processed by hand, and filed in cabinets.
- No real existing internal Records Management plan

Leveraging our existing strengths

- Push to migrate from using network storage
- Already using SharePoint with some confidence
- Don't take away a familiar interface
- Still need collaborative platform
- Centralize communication across the organization

How did we get here?

- Published a Request for Proposals (RFP) for Enterprise Document Management System
- Integration with SharePoint was major requirement
- Received and reviewed 29 responses
- Selected vendor proposed Laserfiche® as the solution

Requirements for Solution

- VPA subject Library of Virginia Records Management regulations
- Internet accessible (Continuity of Operations Plan)
- Ease of use for users
- Search-ability
- File handling (All file types covered)

Process Improvement Example

The RFP and Vendor Selection Process

A few terms to keep in mind

- Workflow - The sequence of industrial, administrative, or other processes through which a piece of work passes from initiation to completion.
- OCR – Optical Character Recognition: Machine recognition of printed characters
- Enterprise – Organization-wide

The OLD Way

- Proposals were submitted in hard copy and date/time stamped upon arrival
- Copies of EACH submitted proposal distributed to each member of selection committee
- Evaluation materials distributed in hard copy
- Copies of finalized contract kept in Contracts, by Contract Admin, Finance


The OLD Way

- All amendments, task orders, etc. distributed via email or hard copy
- NO central location to find current contract information with ease

SharePoint + Laserfiche = Process Improvement!

- Electronic Submission of Proposals
- Emailed proposals routed to SharePoint
- Creation of workspace in SharePoint for evaluation and selection of vendors

Virginia Port Authority Intranet > Procurement Department Private Site

Welcome Angela Ellis | My Site | My Links | 

RFP Workspace All Sites Advanced Search Site Actions

Procurement Department Private Site > Contracts > RFP Workspace > Proposal Submissions

Proposal Submissions

Proposals received electronically

New | Upload | Actions | Settings

View: **All Documents**

| Type | Name | Modified | Modified By |
|--------|--|--------------------|------------------|
| Folder | 2006-12 Financial Advisory Services | 12/9/2010 8:48 AM | Shelley M. Ricks |
| Folder | 2010-10 Microsoft Dynamics RFP | 10/4/2010 8:10 AM | David M. James |
| Folder | 2010-12 Benefits RFP | 10/4/2010 8:08 AM | David M. James |
| Folder | 2011-07 Grant Administration RFP | 10/4/2010 8:10 AM | David M. James |
| Folder | 2011-17 Intermodal Container Transfer Facility | 1/3/2011 11:26 AM | Shelley M. Ricks |
| Folder | Evaluation forms for ALL Proposals | 4/19/2010 3:46 PM | Angela Ellis |
| Folder | Manager and Co-Manager Underwriting | 12/8/2010 11:27 AM | Shelley M. Ricks |

Documents

- Proposal Submissions

Lists

- Calendar

Discussions

- Team Discussion

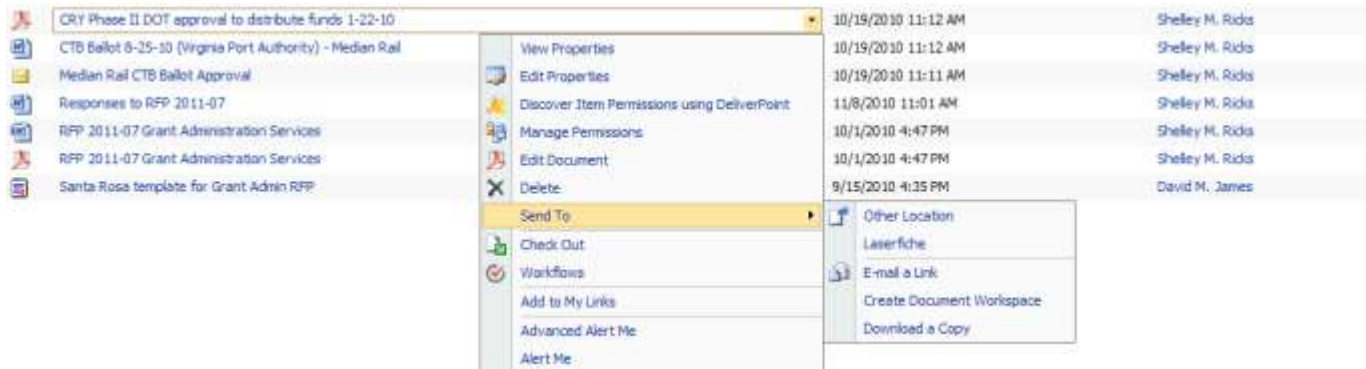
Sites

People and Groups

[Recycle Bin](#)

SharePoint + Laserfiche = Process Improvement!

- Selection committee collaboration on SharePoint
- Finalized documents routed to Laserfiche for retention





In Summary



What does that mean for the VPA?

- No more paper workflow
- Availability of “real-time” information in a *central* location: SharePoint
 - Documents retained and managed in Laserfiche and made available to users seamlessly thru existing SharePoint portal
- Enterprise Search

Features that made it all possible

- Electronic Workflow – Documents flow through the organization for approval and processing without being printed
 - Automated notifications go to Contract admins when amendments are accepted and complete
- OCR – Capturing keyed information on forms, reducing margin of keystroke errors

Features that made it all possible

- Automated filing using barcodes
 - Eliminating man-hours spent filing paper
- Ease of search
 - Users now able to get results in seconds, versus paper research
 - Users can search for specific phrases/terms in document text (OCR)
- Customized searches
 - Regularly used searches can be saved for future use

User adoption issues

- The “C” word: CHANGE
- “WHY do we print that?”
- Teaching users to “Think digital”
- Process *improvement*, rather than mere duplication into electronic form
- Without regular usage, users will lose familiarity with processes