Laserfiche ECM Blogs

Agile ECM Engineered with Laserfiche and SharePoint Makes Spindletop MHMR Services Shine

Written by Meghann Wooster

We've all seen them: the young man suffering from his first bout of bipolar mania—paranoid, delusional and unable to sleep; the 40-year-old veteran, injured in Iraq, addicted to painkillers and living on the streets; the single mother with schizophrenia—abused, uneducated and unconvinced that antipsychotic drugs will ease her pain.

For the people who struggle with these issues in southeast Texas, Spindletop Mental Health Mental Retardation (MHMR) Services has the resources to support their recovery and relieve their distress. But with over 8,000 patients every year and upwards of 400 employees, Spindletop's ability to respond promptly to records requests—and, by extension, to patients—was being compromised.

Over 80,000 files resided in a hardcopy storage facility that cost more than $2,000 a month to maintain. And even with six full-time staff members dedicated to managing hardcopy documents, some records took as long as three days to locate and cost $4 each to retrieve and deliver; others were lost for good.

Realizing that an enterprise content management system would ensure access to high-quality services in a more cost-effective way, the center turned to Laserfiche for help.

Complete Content Management within a SharePoint Site

Spindletop was already leveraging SharePoint for the company's intranet site, but scanning and storing 80,000 documents in SharePoint required more comprehensive content management functionality.

"We wanted to centralize access to patient records without forcing our employees to go out of their way," explains Jerry Carnley, CIO at Spindletop. "Our intranet seemed to be the natural place to do this, but we needed to implement a content management

solution that would be easy to implement, easy to install, and eliminate extra work for the people who deal with patient documents every day."

Spindletop selected an Agile ECM system engineered with Laserfiche and SharePoint, which met its content management needs in three key ways:

- Seamlessly added document imaging functionality to SharePoint with minimal requirements for installation, support and maintenance.
- Dramatically expanded the amount of content that can be stored online while also improving document security.
- Provided federated search across content stored in Laserfiche and SharePoint.

"Given Laserfiche's experience and dedication to the Microsoft suite of technology, we saw that it delivers a complete offering to customers seeking an integrated content management and SharePoint solution," Carnley says.

Specifically, Agile ECM engineered with Laserfiche and SharePoint enables Spindletop to:

- **Bring comprehensive document imaging and records management functionality to Spindletop's existing SharePoint intranet**. Employees scan and upload documents directly through the SharePoint interface, then view and manage them with the easy-to-use Laserfiche document viewer.
- **Supply superior security, records management and content distribution capabilities when content is moved between SharePoint and Laserfiche**—manually, as part of a workflow process or automatically based on a SharePoint expiration policy.
- **Provide the ability to retrieve content from both Laserfiche and SharePoint using Spindletop's intranet search box**.
- **Automate content-related processes based on activities occurring in both SharePoint and Laserfiche** with graphical, drag-and-drop .NET-based workflow configuration that makes workflow design simple for IT staff.

As a whole, Agile ECM provides a cost-effective complement to Spindletop's SharePoint intranet site—with all of the content management capabilities the company needs.

Results of Running Smarter

With the assistance of DynaSource, a Laserfiche reseller located in Texas, Spindletop implemented Laserfiche and transformed the way it manages content, most notably in the four following ways:

- **Instant search and retrieval.** From any internet access point, staff can instantly locate scanned records by using the "Electronic Imaging" tab on the SharePoint intranet site. Offsite employees have
access to the Laserfiche digital records repository through a password-protected Citrix site.

- **Sure-fire security.** Because Spindletop's SharePoint intranet uses full Laserfiche security enforcement, employees are granted access to records by department. Employees can view the records for their
own clients, but restricted patient, employee and financial information remains confidential.

- **Easy and efficient scanning.** Laserfiche templates enable employees to scan ten times more content than they could before the custom templates were implemented.

- **Time-saving automation.** When new content is scanned into the system, Laserfiche automatically populates template fields and generates and organizes new folders and subfolders. Because each client has between six and eight subfolders with a total of 25-52 documents to be scanned, this eliminates redundancy and extra work.

According to Carnley, implementing Agile ECM has had a number of noteworthy benefits. "We've increased productivity, and morale has jumped in every department that uses Laserfiche," he says.

"There's no more waiting around for days for hardcopy documents to be found, and no more lost or misfiled records resulting in huge institutional fines. And we aren't spending thousands of dollars each month on offsite storage facilities," Carnley adds.

But best of all from Carnley's perspective as a CIO is that because Agile ECM engineered with Laserfiche and SharePoint supports developers who need to extend collaboration, scan images and set up workflows to quickly respond to business needs, deployment was quick, easy and affordable. There was no need to hire expensive programmers or IT consultants and no need to build customized plug-ins from scratch. In addition, the intuitive user interface makes the solution easy to administer, since drag-and-drop functionality enables IT staff to permit line-of-business employees to easily make changes to existing workflows and folder trees without IT staff assistance.

"Laserfiche provides a scalable solution that's easy to install, easy to administer and easy to use," concludes Carnley. "We're very happy with the way Laserfiche has enabled Spindletop MHMR Services to expand our use of SharePoint and improve the way we manage content."

Meghann Wooster is a senior writer at Laserfiche, helping information management and IT professionals optimize their use of enterprise content management (ECM) software. Follow her on twitter at @LFMeghann