

Waterloo Region District School Board

Streamlining Record Keeping for Efficiency and Sustainability

Ricoh's document management solution enables the school board to electronically manage its files and better serve its employees, students, and the environment.

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Lorie Hough,
FOI, Privacy & Records
Information Management
Officer,
WRDSB

ABOUT THE CUSTOMER

The Waterloo Region District School Board (WRDSB) is one of the largest school boards in Ontario, educating approximately 62,000 students across 123 locations. Its staff of 9,000 is committed to developing young minds into the leaders of tomorrow, and the WRDSB strives to provide an enriching experience for the students, employees and community it serves.

CHALLENGE

With over 9,000 employees to oversee, the WRDSB Human Resources and Payroll departments had so many files, documents and forms that they were nearly splitting at the seams. Files occupied one entire room and several other areas throughout multiple buildings. "Our HR department in particular had run out of physical footprint," says Lorie Hough, FOI, Privacy and Records Information Management Officer at the school board. "They simply did not have any more room for file cabinets."

Because of the volume of records, the file cabinets were at the periphery of the department, which meant that staff had to leave their workstation every time they wanted to access an employee's file. Questions could not be answered nor issues resolved while the employee was on the phone.

Also, under the old paper-based method, documents would have to physically travel from the Human Resources clerk to the authorizing manager to the payroll department to the employee and their supervisor. Copies of the same information were filed in the employee file and the separate payroll file.

CHALLENGE

- Overflow of physical files encroached on valuable office space.
- Inefficient paper-based filing meant more time to retrieve records.
- Redundant printing created paper waste.

SOLUTION

- Custom document management solution using Laserfiche technology.
- Digitized legacy files, created efficient system for scanning in new files.
- Leveraged Laserfiche Workflow to mirror process staff used for processing and storing physical files.
- Deployed Laserfiche Workflows and Forms to improve document naming, filing, routing and form completion.

RESULTS

- Overall reduction in processing, approval and notification time for all employee forms.
- Increased sustainability by reducing printing and paper needs as well as courier emissions.
- Expand to other departments for increased efficiency.
- Freed floor space from physical file storage.

Case Study

SOLUTION

Recognizing the need for improved efficiency and sustainability, the WRDSB put out a request for proposal to vendors with experience in digital document management. Ricoh's comprehensive and competitive bid won. Leveraging Laserfiche technology, Ricoh presented a solution that would streamline form processing, digitize legacy files and empower staff to be more effective in their work.

Ricoh first conducted discovery interviews with key team members to determine the types of documents, forms and records and identify the department's record keeping needs. This consultation process was the foundation of the entire solution, as it enabled Ricoh to fully understand the school board's needs and create a custom solution to address them.

Using the information gathered, Ricoh developed a strategy to import legacy files into the Laserfiche system. Human Resource staff sorted and packed all of the files before shipping them to Toronto for mass scanning by Ricoh's Legal Document Services.

While Ricoh was digitizing the legacy files, Hough saw an opportunity to streamline even further: "In the past, HR would retain every file for every employee – even those long since retired or terminated. Through our review of all the Human Resource record holdings, we determined that seven years, rather than forever, was a reasonable records retention time."

Scanning stations were strategically installed throughout the office to eliminate the need for paper filing going forward. The team created a process for documents to be easily scanned into the system at any one of these stations. The digitized files would then be indexed based on pre-determined criteria, coupled with the necessary data forms, and sorted into a file structure that allows for easy retrieval by appropriate staff members.

In addition to Quick Fields, Laserfiche Workflow was leveraged to create more efficient document naming, filing and routing, Human Resources will soon be implementing Laserfiche Forms as a replacement for the current paper ones. As a Total Solutions Provider, Ricoh deployed Laserfiche ECM, Managed Document Services for digitization and a process to ensure that all documents were handled correctly at every step. "The system was easy to use for most of us," explains Hough. "A big part of the fast on-boarding was due to discussions with Ricoh about translating our old process into something that would work with Laserfiche, so that staff didn't have to completely change the way they operated day-to-day."

RESULTS

After the legacy files were scanned into the system, the HR department was able to do something they hadn't done in a long time – shred old files. They regained ownership of valuable office floor space, and employees are being put to better use, as they no longer have to spend time hunting through stacks of files and mailing or couriering documents. "A lot of our savings have been in human time," says Hough. "In fact, we have been able to repurpose staff members to do other things or take on additional duties that they could not take on before."

Each document that is processed through Laserfiche now includes an audit trail so that approvals can be monitored and bottlenecks identified. Many formerly tedious tasks have been automated, freeing up staff time and improving overall efficiency in the office.

Employees submitting information to the HR and Payroll departments are seeing immediate benefits. Rather than waiting days or weeks for approval notices to arrive at their schools in the mail, they now receive an automatic email notification as soon as the change is approved.

In addition to the gains in efficiency, the WRDSB is also seeing increased levels of sustainability with the Laserfiche system. The digitization of files has allowed them to reduce dependence on the interschool courier to deliver documents, reducing emissions and strain on the environment. Hough has begun to see other environmental benefits as well: "We are already seeing paper and copier cost savings, and as we move forward and continue to implement this through more of HR and other departments, we should see even greater paper savings across the board."

Other departments have noticed the effectiveness of Ricoh's electronic content management solution for human resources, and the solution is now being implemented across the organization. Vendor registration, social workers, international student enrollment, corporate services and student records have already worked with Ricoh to implement their own Laserfiche systems and workflows, ultimately resulting in streamlined document management across key areas of the school board.

ABOUT RICOH

Ricoh Canada Inc. is a leading provider of sustainable document solutions for Canadian businesses. Ricoh's fully integrated solutions (services, people, software and hardware) enable our customers to effectively and efficiently control the input, output and management of their information as they move towards a digital and environmentally-friendly workplace.

Working with award-winning enterprise software from Laserfiche, Ricoh delivers document management solutions to businesses in the public and private sectors. Ricoh helps companies transform the way they work and harness the collective imagination of their employees.