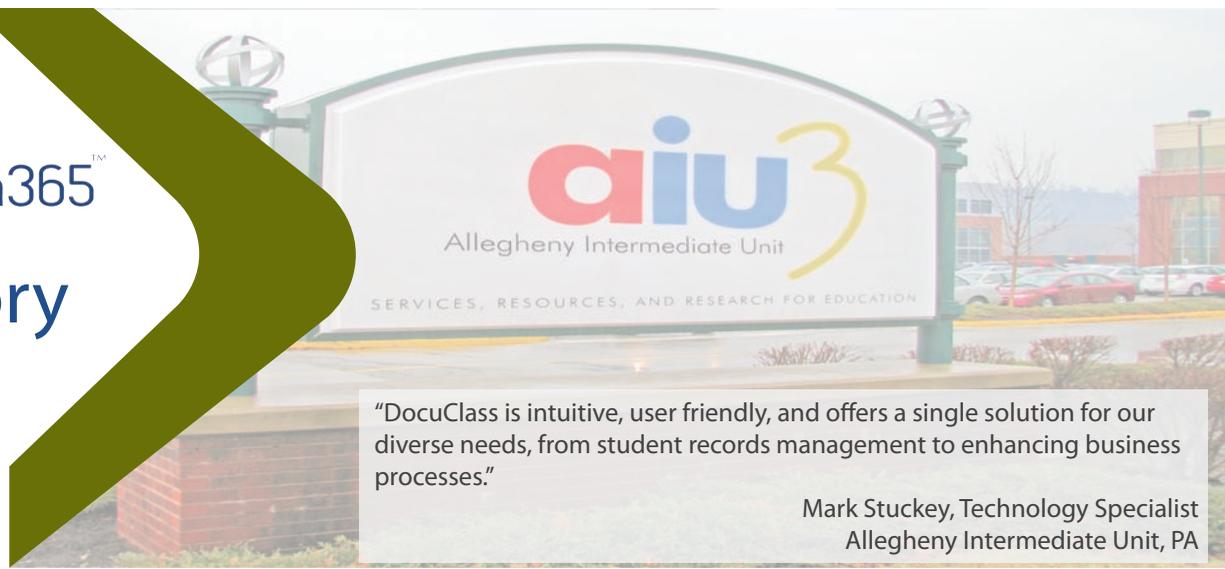




# Success Story

- Accounts Payable
- Human Resources
- Student Records



"DocuClass is intuitive, user friendly, and offers a single solution for our diverse needs, from student records management to enhancing business processes."

Mark Stuckey, Technology Specialist  
Allegheny Intermediate Unit, PA

## Allegheny Intermediate Unit

With a workforce of 2,200 employees across 80 sites in Allegheny County, Pennsylvania, the Allegheny Intermediate Unit (AIU) is a branch of the Pennsylvania Department of Education that houses 130 distinct programs and provides a myriad of educational services to 42 suburban school districts.

### BUSINESS CHALLENGES

AIU employees were frustrated. Although they spent hundreds of hours processing invoices and purchase orders, staff found it difficult to retrieve important financial records, and original documents were being misplaced. Employees often resorted to storing duplicate records at their own desks. Too much time and effort was expended in an attempt to manage the agency's documents.

The goals of AIU were to automate document workflows and implement electronic storage and retrieval of documents. Initially chosen because of its affordability and functionality, DocuClass helped the AIU develop efficient business processes. DocuClass engineers studied the agency's document flows and a pilot project was initiated in the AIU's Alternative Education program.

### ALTERNATIVE EDUCATION

A complex program with several funding sources and ten separate sites, the Alternative Education Program was in great need of a document solution. Because of the constant shift in student population, staff members were spending too much time copying, faxing and mailing documents, such as evaluations and transcripts, to schools and other third party entities. Student files were not centralized, and accessing important student data was a time-consuming process.

With the help of DocuClass, authorized employees now instantaneously access student document files from a secure central database, selecting and sharing portions of files as needed. Using a fully automated scanning process with indexing barcodes, they add new student documents into the system. DocuClass has greatly reduced the possibility of human error.

### ACCOUNTS PAYABLE

With its success in the Alternative Education Program, the DocuClass pilot project expanded into the AIU's Accounts Payable department. Responsible for managing 130 programs, each with unique coding requirements, employees in Accounts Payable often had difficulty identifying ordinary invoices for each program. Approved purchases and checks sometimes could not be linked, and the process of document retrieval was time-consuming.



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### ACCOUNTS PAYABLE - CONTINUED

The department wanted to monitor its entire invoice approval process and automate its document flow. Any solution, however, had to integrate with existing business applications.

Since its implementation, DocuClass now captures financial data from a spool file generated by an AIU business application, while DocuClass' COLD process automatically generates print-ready PDF purchase orders and checks, populating them with the appropriate financial data. DocuClass Workflow manages the necessary batch printing and emailing while automatically routing invoices to corresponding programs for approval. DocuClass also automatically updates the corresponding invoices and purchase orders, issues notifications, and handles exceptions as the documents progress through the Workflow. All documents are now stored securely where authorized employees can easily access them.

### FUTURE EXPANSION

The AIU plans to extend DocuClass into additional departments, including Human Resources. DocuClass will be used to streamline the large amount of paperwork associated with the hiring process by organizing all required documentation and linking all related files. The goal will be to reduce the time from hiring request to position fulfillment by eliminating redundancies, bottlenecks and unnecessary manual work.

Using DocuClass, the AIU also plans to manage maintenance and facility work orders at the agency's 80 sites located throughout Allegheny County. Using a website form, users will submit facilities requests. DocuClass will route emergency requests directly to the facilities coordinator, who will dispatch resources to fix the problems, while non-emergency requests will go to the program director for cost approval. DocuClass will preserve cost information for annual program reviews and all payments will be tied to the Accounts Payable system.

### RETURN ON INVESTMENT

DocuClass greatly reduced the amount of staff time needed to process documents. Documents now move through approval processes seamlessly. Departments know who approves specific documents and when because all information is recorded electronically. With the push of a button, DocuClass places all the required financial data directly into the appropriate documents, eliminating manual data entry. Miscommunication has also been minimized because staff can share and communicate documents instantaneously and automatically, and the use of filing cabinets has decreased dramatically.

"We have been working with DocuClass for over five years. During this time we have greatly improved nine internal processes and are looking forward to significant improvements in other business applications. DocuClass is intuitive, user-friendly, and offers a single solution for our diverse needs – from student records management to enhancing business processes"

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