

Case Study: BeneSys

“*Digitizing our benefit documents using the KnowledgeLake Products and Microsoft Office SharePoint Server 2007 has improved our service to our clients by providing fast, accurate access to those documents while storing them in a more secure manner.*”

— **Steve Kokotovich**, Director of Production and Support Services, BeneSys

Customer: BeneSys

Web Site: www.benesysinc.com

Customer Size: 220

Country or Region: United States

Industry: Pension fund administration

Customer Profile

BeneSys, based in Troy, Michigan, provides administrative and IT services for union trust funds that are governed by the Taft-Hartley Act.

Benefits Administration Firm Boosts Data Access and Safety with Document Management Solution

Shelves and cabinets full of paper documents were costing BeneSys valuable space and related rent—and the files were time-consuming to access. BeneSys, which provides benefits administration and IT services for union trust funds operating under the Taft-Hartley Act, decided to digitize its benefits documentation using products from KnowledgeLake and an intranet running on Microsoft® Office SharePoint Server® 2007. The result is saving space and money and delivering more efficiency for employees when they need to access important data.

Business Needs

BeneSys provides benefits administration and information technology services for trust funds that are governed by the federal Taft-Hartley Act. The company currently services clients and their participants throughout the United States.

Since its start in 1981, BeneSys has accumulated millions of pages of information about pensions and annuities, including historical records dating back to the 1960s that were acquired after the company's launch. The company's paper files were stored in filing cabinets and shelves. As the company has grown, managers have wanted to address some important problems related to maintaining such a large cache of paper documents.

“We didn't have room to store all of the paper files in our Troy facility without paying extra rent, and the files could not be stored in boxes because the documents need to be accessible. We also had concerns about moving single instances of documents,” says Steve Kokotovich, Director of Production and Support Services for BeneSys. “We needed to come up with a solution that could help us minimize the impact on the rent we're paying for the Troy facility, provide better disaster protection for the documents, and keep the documents accessible.”



Solution

BeneSys worked with ImageSoft, a KnowledgeLake partner, to deploy a solution that puts digitized versions of pension and annuity documents on the BeneSys intranet, which runs on Microsoft® Office SharePoint® Server 2007. The BeneSys IT department started planning the project in late 2008, then deployed KnowledgeLake Imaging for SharePoint and KnowledgeLake Capture in the first quarter of 2009. To manage its existing backlog of paper files, BeneSys contracted with Graphic Sciences in Royal Oak, Michigan, to scan the documents. Graphic Sciences scanned about 2 million documents in three months. Once the historical documents were in the system, BeneSys worked with ImageSoft to create a workflow that enables users to scan and index documents into the SharePoint-based intranet using a Fujitsu 6140 scanner. The documents are scanned as searchable Adobe portable document format (PDF) files. “We currently scan hundreds of documents a month into the system,” says Kokotovich. To simplify document searches, ImageSoft implemented a system in which documents are tagged using metadata values that include social security numbers, first and last names, and account information. The digitized documents are stored on a dedicated site within the SharePoint-based portal.

Benefits

Moving its pension and annuity documents to the company intranet using the KnowledgeLake products and SharePoint Server helped BeneSys address the most pressing issues related to its paper documents. Migrating the paper documents to electronic format allows users to access information in the pension and annuity documents much faster than before. The company has increased the level of protection it can give to documents that contain sensitive information. The solution also helps the company reduce the space—and related rent—that would be required to store paper-based files.

- **Faster Access to Documents**

Deploying an electronic document management solution gives BeneSys users much faster, easier access to information than they had in the past.

“Putting our documents on the SharePoint-based intranet helps us improve the productivity of our employees—and provide better member service,” says Kokotovich. “For example, say a union member calls to check on the status

of his pension application process. Our BeneSys pension coordinator navigates to the SharePoint site, keys in the search, and pulls up all the documents relating to that member as PDF files in a matter of seconds. In the past, this might have required significantly more effort to locate the documents before we could get back to the customer.”

- **More Protection for Information**

By putting its documents online, BeneSys has greater control over the safety of information in the event of disaster. Instead of having just a single copy of important documents, the company can make backups for safe storage and archiving.

“The electronic document management solution has improved our security profile and backup and disaster recovery planning, giving us the ability to fully recover from a disaster,” says Kokotovich. “It also enhances our ability to satisfy more client requirements, certain federal regulations, and our own corporate standards. With the help of KnowledgeLake, ImageSoft, and SharePoint Server, we’ve improved access to important information, enhanced the security of our data, and provided a tool for employees to help them serve our customers more effectively.”

- **Reduced Space—and Rent**

Eliminating the need for the extra physical space that was required in the past for file cabinets is allowing BeneSys to reduce the rent it has to pay by thousands of dollars annually. “Digitizing our pension and annuity documents using the KnowledgeLake products and SharePoint Server 2007 saves us thousands of dollars annually in rent because we’ve eliminated square footage that would have been required for our file cabinets,” says Kokotovich. He notes that the paper-based documentation accounted for a large portion of the physical space needed to run that part of the company’s business. “Overall, it let us reduce the space we need for our pension and annuity department by about 70 percent. Going forward, the solution will allow us to reclaim enough square footage to accommodate company growth without incurring additional rent.”