



CITIZEN POTAWATOMI NATION AUTOMATES BUSINESS MANAGEMENT WITH DOCLINK

MULTIPLE BUSINESS TYPES FROM ENTERTAINMENT TO RETAIL TO HEALTHCARE BENEFIT FROM GOING PAPERLESS



COMPANY

Citizen Potawatomi Nation

INDUSTRY

Federally Recognized
Native American Tribe

ERP SOFTWARE

Microsoft Dynamics NAV

WEBSITE

www.potawatomi.org

BACKGROUND

Citizen Potawatomi Nation (CPN) works to retain its culture while being a frontrunner in Native American business. More than 29,000 tribal members are enrolled. CPN operates numerous businesses including tribal casinos, grocery stores, a travel plaza, a golf course, a radio station, health clinics, and First National Bank & Trust. The tribe – which also runs the 36,000-square-foot Citizen Potawatomi Nation Cultural Heritage Center – generates an estimated economic impact of about \$506 million.

CHALLENGE

CPN found itself bogged down by paper invoices, packing slips, statements, and other vendor documents. The tribe had an entire room dedicated to storing 20 rolling files. All eight AP technicians had at least one filing cabinet, and an entire 30 x 50 metal storage building was filled with paper. “We were at the point where there was no room to store anything else,” says Anthony Arington, Financial Applications Manager. CPN was also dealing with missing files and hours spent searching for documentation. The tipping point came in 2005 when the tribe decided to become one of the first in the U.S. to embrace a paperless work environment. “We didn’t want to be behind the times,” says Arington. “In fact, we wanted to be ahead of the curve.”

“THERE ISN’T ANOTHER PIECE OF SOFTWARE THAT’S COMPARABLE. WORKFLOW IS OUTSTANDING AND HAS SAVED US A TREMENDOUS AMOUNT OF TIME, PARTICULARLY AP.”

- ANTHONY ARINGTON, FINANCIAL APPLICATIONS MANAGER



THE DOCLINK SOLUTION

DocLink was rolled out slowly, and the tribe spent two months getting its staff up to speed on it. When the tribe upgraded its accounting software, the new system’s ability to interface with DocLink was a crucial deciding factor. “Our ERP was getting out of date but DocLink wasn’t and we still wanted to use the latter,” says Arington. “The new provider worked with Altec to make sure DocLink worked correctly,” he adds, “and everything was built out to our specifications.”

CPN uses DocLink workflow as its virtual AP inbox and for the scanning and storage of AR documentation. “Once the item is scanned and collated in the system, the workflow is created and stored in the virtual inbox,” says Arington. “When the clerks come in every morning, everything they need to work is right on their desktops.”

Determined to eliminate onsite filing, HR uses DocLink also. “We store 20 different HR documents from personnel forms to background checks to benefit information,” says Arington. “The information is linked to the HR system and can be pulled by employee name or ID number.”

BENEFITS FOR CPN

Accounting and HR have saved considerable time and effort. “Within several months, DocLink has exceeded our expectations,” says Arington. Accounting has also been able to make better use of limited space and cultivate a more tech-savvy staff that works more effectively. Key gains include retrieving documentation quickly and accurately and the establishment of virtual inboxes.

“The virtual inbox allows personnel to begin work without having to first organize their desks,” says Arington, who estimates that every clerk has reduced the time spent searching for paper by one day per week. Cash management offices will also have a virtual inbox that will allow Accounting to have separation of duties within functions and limit scanning and indexing time. “We are creating the auto-indexes and EMF capture for this area,” says Arington. DocLink has scaled up along with the tribe. “We’re doing a lot more invoices today than we were eight years ago,” says Arington, “but thanks to DocLink, Accounting has actually become functional, accurate, and timely, even as the tribal businesses have expanded.”

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