



THE CITY OF SALISBURY LEVERAGES DOCLINK FOR ACCURATE AND QUICK MANAGEMENT

EXPEDITING AND AUTOMATING WORKFLOW APPROVALS HAVE INCREASED SPEED FOR MUNICIPALITY OPERATIONS



COMPANY

City of Salisbury, North Carolina

INDUSTRY

Government Municipality

ERP SOFTWARE

Microsoft Dynamics GP

WEBSITE

www.salisburync.gov

BACKGROUND

Established in 1753, the City of Salisbury is the county seat of Rowan County and home to famed soft drink, Cheerwine, and regional supermarket Food Lion. The city has developed a strong reputation for historic preservation and is the site of a noted American Civil War prisoner of war camp. Many historic homes and buildings date back to the 19th and early 20th centuries, and several are listed on the National Register of Historic Places.

CHALLENGE

The City of Salisbury's AP department had to manage hard copies of every document, and the manpower involved with writing and filing checks was taking its toll on productivity. Researching past invoices and payments meant having to dig through an enormous file. "The sheer volume of paper going through AP was unbelievable and growing," said Mark Drye, Senior Management Analyst, "Right along with the amount of filing space we were using and number of man-hours spent managing paper." The city also lacked an automated invoice approval system – often resulting in important papers piling up on desks, awaiting approval or eventually becoming misplaced. "At times," said Drye, "we've had to run up and down the hallway to find a missing invoice or document."



“WE WERE EXPECTING A ‘SCAN AND SAVE’ TYPE SO WORKFLOW, ROBUST SEARCH FROM SMART CLIENT, AND THE ABILITY TO GIVE ACCESS TO IMAGES HAS BEEN A BIG PLUS.”

- MARK DRYE, SENIOR MANAGEMENT ANALYST



THE DOCLINK SOLUTION

Intent on a centralized system to scan, store, and access documents, the city worked with its Microsoft GP partner, Cogsdale, to identify the perfect software. Ryan Cawley, Account Executive at Cogsdale, said, “Several years ago, we made the decision to recommend Altec. For us, it’s the norm. Any time we have a customer where document management is required, we include DocLink.” Key criteria included online check and document imaging, ERP integration, and seamless workflow from PO issuance to payment remittance. “We contacted Cogsdale and said we needed a solution. Knowing their success with DocLink was good enough for us,” said Drye.

During implementation, AP learned that DocLink could also handle automated EFT payments and now scans all paper invoices to distribute via email for approval. When complete, the invoices are dropped into a queue for further processing and payment. “The one thing that we absolutely loved was online approval,” said Drye, “and being able to set documents in appropriate queues with the click of a button. We no longer worry about documents languishing on approvers’ desks.”

BENEFITS FOR CITY OF SALISBURY

Using DocLink, the city has saved man-hours, sped up AP approval processes, and cut down on paper to file. Through remote connection capabilities, department heads can approve documents from their desks or while they’re out – an automation bonus that wasn’t feasible with the previous system. “More importantly,” says Drye, “we’re not shoving paper from office-to-office anymore.”

The municipality’s next steps will be to set up an automated process for check requests (currently handled with an Excel document) and a DocLink expansion that will extend the value of the Cogsdale Customer Service Management application, allowing for viewing of documents from the CSM screens. The expansion will also include customer agreements, contracts, and payment agreements for the city’s 20,000 utility customers. “Right now the paper comes in and we may keep it or throw it away,” says Drye. “Using DocLink as a central repository, our goal will be to create a backup of those documents for future use and reference.”

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