



Research Foundation – City University of New York (RF-CUNY)

RF-CUNY Implements docSTAR ECM to eliminate paper burden, reduce costs, improve collaboration, and increase efficiency in Human Resources, Legal, Payroll and Finance & Procurement

Challenges

Flexibility, response time, changing requirements, administrative efficiency, high operating costs

Solution

docSTAR Enterprise Content Management

Results

Reduced paper burden, improved workflow, increased efficiency, lower maintenance costs

The Challenges

Cut costs, improve efficiency, and reduce bottlenecks

The Research Foundation of The City University of New York (RF-CUNY) is a private, not-for-profit educational corporation chartered by the State of New York to serve The City University of New York (CUNY), the nation's largest urban public university. The RF supports CUNY faculty and staff who have received external grants from government and private sponsors by providing the administrative services for these programs.

Awards exceeding \$410 million include research in the natural and social sciences, training, job placement, curriculum planning, assessment, program evaluation, media production, and software development.

Approximately 12,000 full- and part-time staff are employed by the RF annually and can be found in the laboratories, theaters, studios, libraries, and offices of CUNY's 24 colleges and professional schools, as well as at numerous off-campus sites.

The RF was created to offer flexibility and the capacity to quickly respond to a wide variety of conditions and changing sponsor requirements. The group provides direct administrative services for these programs to manage, negotiate, administer and ensure compliance with its many sponsors.

“Here at RF-CUNY we handle all the administrative functions associated with grants management so our researchers can focus on what they do best --

research,” said Renato Rodriguez, Assistant Director, Business Systems Analysis for RF-CUNY’s Systems & Information Services Department. “We manage all aspects of grant management including human resources, payroll, legal, finance and purchasing. If a researcher needs to hire an employee or purchase equipment – we review and handle the transaction to ensure that it meets regulatory, sponsor, Federal and State guidelines.”

With so much paper documentation passing hands, Rodriguez and his team knew they needed to improve efficiency for employees and management and started to plan for the eventual transition from cumbersome paper to digital documents.

The Solution

A scalable, affordable, web-based solution that checked all the boxes

RF-CUNY had a legacy system to manage some of their documents, but it wasn’t meeting their growing needs. “We needed a more agile and feature-rich solution to handle our volume of paperwork. Also, since we do a lot of our own in-house development, we needed it to integrate with our systems. With docSTAR’s robust API capabilities we knew that seamless integration with our systems was possible.”

RF-CUNY also wanted to reduce the demand for physical storage space and make it easier for employees to store, access and retrieve documents from any location. The organization selected docSTAR for its web-based interface, scalable implementation and overall cost effectiveness.

“A web-based enterprise content management system allows us to share documents quickly and effortlessly, and the total cost of ownership of the product was in line with our budget,” said Rodriguez. “We were also looking to gain efficiencies without drastically changing our current process,” recalls Rodriguez.

“We didn’t want a product with a steep learning curve. It was really important that our employees could learn, accept and use the system effectively within a short time period. docSTAR met all of these requirements.”

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The Results

Reducing The Paper Burden

The first step towards managing their immense document load was to import the documents from RF-CUNY’s legacy system into docSTAR. “Getting the documents out of our legacy system into docSTAR was initially a challenge,” says Rodriguez. “But by working closely with the team at docSTAR, we were able to accomplish our goal. The Professional Services team was extremely diligent, knowledgeable and accommodating. We worked closely together to solve many problems.”

“Our team set up their configuration and workflows, and together we imported approximately 1 million documents that were stored in the previous application,” said Rod Silvers, Professional Services Manager for docSTAR.

“By working with Mr. Rodriguez as a close partner, we were able to address any issues and get them up and running with docSTAR in a way that met their unique requirements.”

Rodriguez and his team saw immediate improvements once the documents were in the docSTAR central repository. “The user interface and search capabilities are so much better,” said Rodriguez. “By scanning and storing our files in docSTAR we have seen a big difference in the visual clarity and quality of the documents; they are much easier to read, and we can find exactly what we are looking for since everything is indexed and searchable.”

Improving Workflow and Increasing Efficiency

The Human Resources Department is successfully using docSTAR to scan, store and retrieve employee documents. These documents are stored securely in folders with restricted access. This security is further enhanced by the availability of audit logs for documents, which can be reviewed by HR managers.

Additionally, RF-CUNY is storing most project-related documents in docSTAR – employee folders, contracts, invoices, correspondence and other documents related to grants are now centrally stored in one location, improving operational efficiency by giving employees controlled access to files anytime.

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“The docSTAR system’s integration tools have had a terrific impact on productivity,” says Rodriguez. “Previously, we had documents like contracts that had to be sent back and forth for approvals and then scanned into the system. By utilizing docSTAR’s Web Services, we can now take documents from our in-house systems and store them automatically in docSTAR. We eliminated the

need for the scanner in this specific instance and freed that employee’s time to focus on the more pressing needs of our research teams.”

“Storing documents in a common repository allows multiple teams to view the same version of the document. Information is always up-to-date and accessible. Commonly performed searches can be saved so that users don’t have to recreate them and sharing documents with external users is easy through docSTAR’s email feature.”

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Reducing Maintenance Costs

Since implementing docSTAR, Rodriguez and his team have not only reduced their paper files, but have eliminated the time they previously wasted resolving issues they had with their old system.

“With docSTAR, we are enjoying much lower maintenance in terms of time and money,” says Rodriguez. “With our old system, we dealt with constant problems like the bad image clarity, inability to locate specific documents, failing processes and system downtime. Now we don’t have these types of issues. When a system works the way it should, it costs less to operate.”

Rodriguez also relies on quick support from docSTAR should any issues arise. “Like with any software system, there are going to be times when you need support. These days our issues are few and far between, but I know that if I have a problem I can call docSTAR and get help immediately. Also, I know that I can count on Professional Services, should I need to escalate an issue. There are always resources available to me at any time – If I have a problem, I can count on docSTAR to help me resolve it.”

Looking Towards the Future

While HR is using docSTAR to store all of its employee documents, RF-CUNY plans to build on the current implementation by using docSTAR for their new electronic HR Onboarding system. “The Onboarding system will collect and process all new hire and rehire documents electronically and then automatically store them in docSTAR, completely eliminating the need for the current paper process. Once in docSTAR, the HR department will continue to have the same secure access to employee records. Incorporating docSTAR with our new Onboarding system will make our entire process more efficient,” notes Rodriguez.

In addition, RF-CUNY has introduced a new homegrown system to their Legal Department, which is currently in the testing phase. “For each transaction that we process, we typically need supporting documentation. With docSTAR, we can store these documents electronically, saving us significant time and streamlining our workflow. By centralizing document storage, we can improve interoffice communication and collaboration with our legal, procurables and grants management teams.”

By integrating their homegrown system with docSTAR, RF-CUNY has reduced the time their team spends performing routine functions; such as scanning, filing and retrieving records. The time previously required to coordinate contract approvals and access supporting documentation has also been significantly reduced. Rodriguez says the next step in his organization’s deployment of docSTAR is evaluating the potential for broader document storage and increased integration with new homegrown systems.

“We have had great feedback so far from our employees and are taking steps to implement docSTAR in new areas of our organization. Our ultimate goal is to use it as a repository for all business documents – including all paper documents that need to be scanned as well as electronic documents processed by our homegrown systems. We have already started this process, and we are looking forward to continued success with docSTAR.”

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Are You Ready?

Take the first step in automating your paper by taking our [6 Minute docSTAR Enterprise Content Management Tour](#) today to learn how docSTAR solutions will help you increase productivity and cut costs!

Let docSTAR empower you with the tools & data to achieve extraordinary results.

Contact our business automation experts today and start working smarter.

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About docSTAR

docSTAR develops content management and accounts payable automation solutions designed to help you improve productivity, offer deeper business insight and reduced costs so you can focus on managing your business. More than 2,000 organizations of every size and in every industry, trust docSTAR with their content.