

## HARLEY-DAVIDSON OF WASHINGTON

### **Cycle, Auto Dealer Gets Performance Boost from docSTAR**

Customers of HDW Limited, based just outside of Washington, DC, are used to speed and precision. And because the firm has adopted electronic document imaging, the company's employees – particularly those handling back-office operations – are getting a taste of speed and precision themselves.

HDW Limited operates two motorcycle dealerships – Harley Davidson of Washington and All-American Harley Davidson – along with a sport bike shop, four used car lots, a couple of metal recycling operations and an auto repair facility.

Phil Carlson oversees information technology for HDW. And part of his role is to help make sure back-room operations run smoothly.

The administrative staff, he says, is made up of just under a dozen professionals who handle accounts payable, accounts receivable, sales support and more. Insurance and finance are done at the half-dozen or so retail locations, but all documentation for these come back into the home office, as well.

It's a busy operation. "A huge amount of paperwork comes through the office," Carlson says. And the company needed a way for employees to manage the paper better.

#### **Doing research**

The solution – information about the solution, anyway – was as close as the boss' office. According to Carlson, the company had recently received sales material from MEDI, a Maryland-based docSTAR partner, outlining how imaging could help the business manage its paperwork.

HDW set up a time for MEDI to come in and talk about the system and show its benefits. In the meantime, Carlson did some behind-the-scenes due diligence and comparative shopping. "I deal with a number of different vendors, so I contacted some of them and asked what they offered," he explains. "I talked with others about what's going on in the world of imaging."

Carlson didn't make the calls to convince himself that electronic document management made sense. "I'm an IT guy, and obviously digital is better for me," he says. "I like document imaging." He just wanted to make sure the company was buying a product that would not only work at the time, but that would be able to expand as the company's needs grow.

"From the research I did, talking with other folks out there, docSTAR seemed to be the best on the market," he says. So in early 2006, HDW took the plunge.

#### **Going live**

Implementation was rather straightforward. "The system is fairly intuitive," Carlson says. "I think the hardest part is actually figuring out what's important when you're setting up templates." Templates lay out the filing instructions for scanned documents. They bring consistency and uniformity during the scanning process, reduce the number of keystrokes required to electronically file a document, and make searching and retrieval easier down the road.

Carlson didn't have to tackle template design on his own. MEDI led him through the process. Together, they even involved the administrative staff in the process. "It may sound odd, but if you don't actually use the documents and you aren't the one who has to retrieve them, you may not be the best person to design the templates," Carlson explains. "So we got staff together and sat down and had a brainstorming session for each document type."

Generally, the department using a particular document most often was the one that provided the most valuable input for each template creation. If it was an accounts payable document, the people from accounts payable would define how they use the document and how they'd retrieve it. "Based on that, we'd start building the templates," he recalls.

Once the templates were created, staff tested them to make sure they fit the bill. "Ideally, you don't want to do a lot of scanning before you do your tweaking," Carlson adds. "If you do, you end up in a situation where you have to redo things."

Actually, he notes, one key feature of docSTAR is that "redo" isn't really part of the mix. "You don't have to undo something, take it out and rescan it," he says. If a template is changed or amended, all that's required is to rerun the new template on the already-scanned files and they automatically take on the new format. "That's a good thing," he adds. "docSTAR will allow you to make changes, which is a really nice feature."

### **Valuing support**

MEDI stuck with HDW through the installation process. Their service package included a predetermined number of training hours, and part of the training was setting up templates. Not only did Carlson learn template creation. So did some staff. "It's rather simple," he notes. Now, as the company adds new document types, it's easy to add new templates.

Carlson speaks highly of service from docSTAR itself. Not all installations require interaction with docSTAR. But HDW was purchasing one of the first rack-mountable servers docSTAR sold. And Carlson had some up-front configuration questions. "I was able to call them and talk to them directly," he recalls. "So before I actually spent the money, I was able to talk right to them, without having to work through a salesperson or intermediary."

He still values the intermediary, though. "I get wonderful service locally," he says. He calls the support and problem resolution MEDI brings to the table "a big plus." Even though Carlson deals with technology regularly, there are things about document imaging that, since he doesn't do it every day, he has questions on. "All I have to do is call and ask a question," he says. "And they take care of it right away."

### **Achieving results**

Since implementing docSTAR in early 2006, HDW has put the system to the test. "Because we have so much paper that comes in, it's pretty much a full-time operation, with someone scanning all day long," Carlson says. When there's a lull in daily work from the half-dozen or so remote locations, the scanning operator is working backwards through files, getting older documents into the system.

HDW uses what's called back-end scanning. "Documents don't get scanned when they first come in," Carlson says. "Work is done first, whether that's writing a check, making an entry into the general ledger, or some other procedure. Then it's sent to the person who scans everything." On an average day, this could entail up to 500 documents.

Once the scanning is done, anyone in the administrative office can access any of the documents. "At any time in the future, once something has been scanned, we're able to recall it in a matter of a few seconds," Carlson notes. "You put in your request, and whatever you want pops right up for you."

That comes in handy not only in day-to-day work, but also when it comes time to compile data. HDW needs to generate detailed monthly franchise reports for Harley-Davidson headquarters. This used to take up to six hours to complete, Carlson explains. "But by having everything put into docSTAR, it's now done in about two and a half hours."

The individual can sit at her desk and everything is right at her fingertips. She doesn't have to get up from her desk, go to the file cabinet, find the exact file and document, walk back to her desk and input the information. "If she's saving that much time every month just on one report, that adds up," Carlson says.

### **Counting the benefits**

Search and retrieval is made easier through the use of optical character recognition, or OCR, software. OCR software simply converts scanned text images into readable and searchable text. "We use optical

character recognition a lot – probably more than any other feature,” Carlson says. “When we’re trying to find a document, it is sometimes easier to search for a certain word or name we know.”

OCR complements the field-based search capability that results from the use of templates. “Along with template searching, we use OCR, because it’s often easier to find what you’re looking for,” Carlson adds. This ability to find information right at the desktop – without having to go search through file cabinets – makes for happy employees. “All the people who use it are loving it,” Carlson notes. “They figure they save, on average, up to a half an hour or an hour every time they’d have to go retrieve a document.”

But the time savings goes beyond finding documents. It’s quicker to share documents through docSTAR, as well. When a request or question comes in, staff members can retrieve a document and then, with the click of a button, send it as an email attachment or directly to a fax number, right from the system. “That’s a big feature for them,” Carlson says.

The system is also making an impact beyond the administrative staff. The company controller frequently accesses documents and reports from the system. And Carlson himself is using docSTAR to help manage some of his own documents.

In addition to the ease of access the system offers, it also brings an added layer of security to the company. “Besides having all of the data on the computer instead of in file drawers, we also back up these electronic files to an optical disc,” Carlson explains. That’s kept at another location, so it’s secure. “The simple fact that we have multiple locations where we store data, instead of having just one piece of paper that could easily burn up, makes us that much more secure,” he adds.

### **Mapping the future**

As HDW spends more time using docSTAR, Carlson is able to see more potential uses for the system. For instance, the thought of picking up another scanner has crossed his mind. “With another machine and another person scanning, we can start bringing in all of the archived documents we have stored.” Such a move would let the company get rid of its old paper files, as well as the cabinets used to store them.

He also sees a day when documents the company generates go directly into docSTAR, without ever being printed out. “If we can do that, it would be a huge savings in time and, for that matter, the amount of paper we buy,” he says.

Remote access is another possibility. Well, it’s actually a reality, but one that could be expanded. Carlson already is able to retrieve his IT-related documents from home by logging on to the company’s virtual private network. But in the future, he may consider offering access via VPN or Internet connection to let remote offices and business partners access specific documents.

Even before that happens, though, Carlson is looking at integrating docSTAR with the software program the company uses as its primary database. Aligning the electronic document management system with the corporate management system will allow reports to be generated and downloaded directly to docSTAR, which will help the company better manage its operations.

Carlson is also investigating how to extend imaging benefits to other departments. Payroll is one area. Given privacy concerns, he may recommend bringing in MEDI to securely scan archived paperwork and then shred the paper documents.

Whatever he does first, Carlson plans to take things one step at a time. “People throughout the organization are becoming more and more familiar with the technology, and how much those who use it get from it,” he says. “They’re really starting to realize how beneficial the technology is.” And that should allow HDW to find even more uses for what docSTAR offers, and realize even greater benefits from using the system.