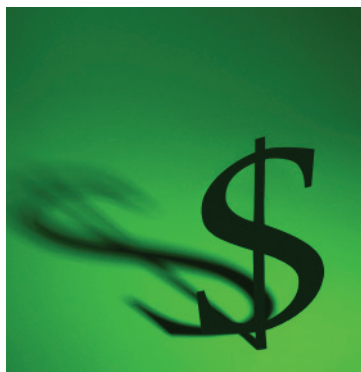


# DISASTER RECOVERY MADE SIMPLE WITH SMARTSEARCH

## CASE STUDY



**BUSINESS:**  
Finance

**COMPANY:**  
Franklin Regional  
Retirement Systems

**OBJECTIVES:**  
Back up critical  
documents for disaster  
recovery purposes

## Modest investment in easy-to-use SmartSearch Content Management Suite protects Franklin Regional Retirement Systems against possible multi-million-dollar document losses

For Franklin Regional Retirement Systems, implementing a disaster recovery strategy for critical documents required a surprisingly simple solution.

Established in 1937, Franklin Regional Retirement Systems is the retirement system for government employees for the 40 small towns and fire and water districts in what was formerly the Franklin County region of Massachusetts. It is one of 106 public retirement boards comprising the Public Employee Retirement Administration Commission (PERAC) of Massachusetts. Franklin is tasked with collecting and investing contributions and tracking accrued benefits for its 2,500 members, and accurately calculating their benefits upon retirement.

Dale Kowacki, executive director of Franklin Regional Retirement Systems, is a native of the region and has close ties to the people living and working there. He recognized that a catastrophic loss of critical employee retirement data resulting from a natural or man-made disaster would have potentially enormous financial consequences, and would be personally painful as well.

Labor costs to reconstruct vital retirement data, Kowacki estimated, might be \$560,000 or more – assuming the data could be obtained from other sources at all. Even more calamitous if not calculated accurately, errors of as little as \$5,000 in benefits overages per employee could potentially equate to \$10 million in additional losses system-wide. Clearly, a reliable backup system was imperative, but it had to be both affordable and easy-to-use by Franklin's four-person staff.

Kowacki considered a number of options, including the use of outside scanning services – an expensive proposition that he reports would have cost tens of thousands of dollars and put sensitive employee information into others' hands. "What I really wanted," Kowacki says, "was to be able to walk up to my copier, push a button and be done." Eventually, Kowacki was introduced to the SmartSearch Content Management Suite developed by Square 9 Softworks, which he says allows him to do just that.

Now Franklin captures and stores these documents electronically with SmartSearch. The process is simple: A staff member organizes the documents for a particular employee into the desired scan order and prepares a bar code cover sheet which includes key data for indexing – such as the individual's name, date of birth and social security number. The documents and bar code scan sheet are loaded in the copier and – at the push of a button – are automatically scanned, indexed and entered into SmartSearch. If needed, documents can be found and retrieved quickly from staff members' work stations. The data is burned to DVDs and stored off site as well.



## ABOUT SQUARE 9 SOFTWARES

Square 9 Softworks is a leading developer of innovative, business-centric software solutions including the award-winning SmartSearch Content Management Suite. Dedicated to making content management available to organizations of all sizes, Square 9 Softworks designs solutions built on open architecture and cutting-edge technologies that drive efficiency and productivity across all business applications.

Through decades of experience with content management technologies in business enterprises of all kinds, Square 9 Softworks has acquired a thorough understanding of document-driven business processes. Intensely customer-focused and highly responsive, the company delivers effective, value-driven solutions and has achieved a reputation for excellence in meeting the rapidly evolving needs of its customers.

Square 9 Softworks distributes its solutions exclusively through a network of highly skilled channel partners from its corporate office in New Haven, Connecticut. For further information, visit [www.square-9.com](http://www.square-9.com)

"SmartSearch enabled us to secure critical information easily and at low cost," Kowacki explains. "In the event of a disaster, I know with great certainty that we can be up and running almost as if the disaster had never happened. As Franklin's executive director and as a member of the community, this gives me considerable peace of mind."

Kowacki also appreciates the fact that SmartSearch stores Franklin's documents as PDF files, not a proprietary image format. "Because documents are stored as PDFs, SmartSearch gives me the ability to export them and use them in a variety of ways," he says. "Other software solutions could not provide us with that kind of flexibility." Kowacki says his administrative staff has found SmartSearch very easy to learn and use. "They haven't had any trouble with it," he says.

"The SmartSearch Content Management Suite has allowed us to back up critical data quickly and affordably," Kowacki says. "I would certainly recommend SmartSearch to others who require a reliable and easy-to-use solution."