

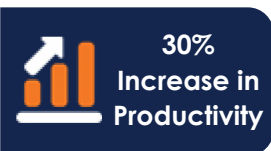
GlobalSearch® Gave a Foundation the Fuel to Power the Future of Ministry

The United Methodist Foundation of Indiana delivers transformational leadership through the widespread financial management of United Methodist Churches located in the Hoosier State. Overseeing more than 100 endowments and trusts, the Foundation offers these churches a variety of financial services including investment management, financial education, fundraising campaigns, grant-making and more.

Daily operations at United Methodist were lacking the strength and back-end office support that would enable the Foundation to streamline the processing of financial paperwork. The basic document management solution they were using failed to provide the benefits of a digital work environment. Standard document processes were time consuming, automated functionality was limited, and methods in digital collaboration were inefficient. Data entry remained a manual process, and accessibility was tedious as licensing forbid multiple users to access the software at the same time. While United Methodist eliminated the need to purchase additional storage space, the Foundation quickly realized this bare-bones software was incapable of establishing significant ROI in their organization. It was time to look for a new solution.

To address ongoing challenges, United Methodist implemented GlobalSearch®, an enterprise content management solution designed to boost business efficiency through the automation of document processes. Offering scalable functionality that could grow with the Foundation's evolving needs, GlobalSearch came standard with many features that would inquire add on expenses in competing solutions. The software introduced advanced search functionality which immediately improved employee productivity, as multiple users could enter keywords or data strings to pull up documentation at any time. This in return, enables United Methodist to remain compliant with financial management regulations and be better prepared in the event of an audit.

United Methodist's Accounting and Operations departments have increased productivity by 30% now that they use GlobalSearch daily. This is allowing staff to save 20 hours per month on administrative tasks, equating to over \$4,000 in annual labor costs on document search and retrieval alone. In addition, the Foundation continues to



Snapshot

Industry:

Financial Management – Religious Organization

Departments Impacted:

Accounting and Operations

Featured Products:

GlobalSearch, KeyFree Indexing

Objectives:

Leverage an easy to use document management solution that will improve employee productivity, collaboration, and reduce time spent looking for documents.

save over 26,000 sheets of paper annually, allowing them to eliminate an additional \$3,000 in yearly paper costs. Since the user-friendly functionality of GlobalSearch was so easy for employees to pick up, data accessibility is no longer an issue as each department can practice efficient self-service, without waiting an extra moment to view a document.

Additional functionality built-in to the GlobalSearch solution, including the KeyFree Indexing module, have cut administrative time spent working within the software in half. An OCR-

Cut Labor Time in Half



assisted indexing tool, KeyFree eliminated manual data entry, replacing physical typing with a simple point and click action. Now, staff can archive new documents in a matter of seconds, providing employees with more time to focus on high-level priorities – doubling the Foundation's overall efficiency. In addition, document storage and back up processes were executed in GlobalSearch in only a matter of days, versus the weeks it took United Methodist with its previous solution. With a secure disaster recovery option in place, business can continue as usual with invaluable peace of mind.

As United Methodist's use of GlobalSearch continues to grow, future initiatives include implementing additional processes that will allow them to eliminate all paper-based office tasks. United Methodist would recommend GlobalSearch as an easy to use solution, enabling organizations to work at the greatest level of efficiency. For more information on United Methodist Foundation of Indiana, please visit www.umfindiana.org.

Interview: Chris Jacobs

Controller, United Methodist Foundation of Indiana

Q. What business challenges led you to GlobalSearch?

Chris Jacobs: Our previous document management solution was very time-consuming. Our software licenses were set up in a way that allowed only one individual to add files into the software at a time. In addition, entering the meta data into the software for each file was a manual process and the software's search functionality was very limited. As a result, it required a lot of time to retrieve the documents we were looking for.

Q. How have processes changed since implementing GlobalSearch?

Jacobs: Once training was complete, we immediately stopped adding documents into our old software and started putting them into GlobalSearch. The basic functionality was extremely easy to pick up for our employees, and the more advanced functionality was absorbed within a few weeks. Documents are now easily stored in one area and no longer need to be retained in a physical paper format. Whenever we need to reference a document, we no longer have to manually pull it. We simply type in the search criteria and GlobalSearch brings it up in a matter of seconds, saving us time and energy.

Q. In what ways has Square 9's product suite improved business performance?

Jacobs: The transition process has been very smooth overall, and the software and its capabilities has left us highly satisfied. Employees have saved a significant amount of time in the process of adding documents into our document management software. Previously it would take a week or two for documents to be backed up, but now our documents are added into the software within days. Now that less time is spent storing and backing up documents, employees are more efficient and can focus on more important tasks at hand.



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— United Methodist Foundation

Q. Would you recommend GlobalSearch?

Jacobs: I would recommend GlobalSearch to anyone looking for a new document management solution. Out of the software programs we reviewed, GlobalSearch provided the best solution for the challenges we were facing and the improvements we were looking to implement. It provided the functionality we needed and has allowed us to greatly improve our processes as they relate to document management. We look forward to making it a part of our long-term plan and utilizing its other features to help take our office paperless.