

Energy Co-op Powers Efficiency with Document Management Integration

Harrison REMC is a not-for-profit electric utility organization, locally owned and operated by the members it serves. Since 1938, Harrison REMC has provided electricity across Southern Indiana and today, the co-op continues to provide reliable, affordable and safe electricity to over 23,000 people.

Over the past 81 years, the cooperative territory has transformed into a mix of both residential and industrial members. This change in membership has also led to many changes in technology and the way Harrison REMC conducts business. The co-op needed to become more digitally-driven. To compliment their digital transformation and reduce their reliance on paper, Harrison REMC implemented Square 9's award-winning GlobalSearch document management solution.

GlobalSearch was quickly put into action as Harrison REMC was looking to simplify their accounts payable process. Previously, the co-op had an accounting binder that got passed around once a week for approval. Sometimes the binder would sit for days in one room, which not only delayed payments, but other worker's priorities as well. With GlobalSearch, all invoices are now scanned into the system where one person can digitally assign each individual invoice to the appropriate approver, in a collaborative and streamlined digital process!

GlobalSearch was also implemented into the Service Order Department, which works primarily with member documents. Space was becoming a major issue as Harrison REMC was running out of room for filing cabinets. In addition, they lacked any good way to quickly locate important member information. When searching for a document management solution one "must-have" functionality was being able to find things quickly and to have peace of mind that documents were getting archived properly. **Harrison REMC was faced with the challenge of purchasing off-site storage space before GlobalSearch, and now after scanning and shredding files, they have freed up an entire room which will soon be transformed into a training facility. They've eliminated over 20 filing cabinets and hope to remove 20 more!**

Best of all, GlobalSearch paired with Square 9's capture automation solution, GlobalCapture, has been a huge time saver for Harrison REMC. The solutions seamlessly integrate with the co-op's existing business applications which include

Snapshot

Industry:
Energy

Departments Impacted:
Accounts Payable, Operations, Data Management, Service Orders Department

Featured Products:
GlobalSearch, GlobalCapture

Objectives:
To lessen their reliance on paper, eliminate the use of filing cabinets, and enable staff members to quickly and easily retrieve documents.

OpenOne by ATS and Power Software. When it comes to easement paperwork, Harrison REMC can now scan and index documents based on map location. In a unique integration, Partner Software displays a map and the easement location data is merged into GlobalSearch. So, while workers are in the map, they can pull up that easement without having to open GlobalSearch.

Harrison REMC also uses GlobalSearch to measure Large Power Billing. The co-op uses automated meters that download radio-transmitted data directly into computers that process the readings to generate monthly electric bills. Before GlobalSearch, they'd have to go in once a month to access and print that data. Staff was sifting through 600 papers to pull out three different pieces of information for billing. **Now Harrison REMC has set up a process where GlobalCapture uses Optical Character Recognition technology to pull those three pieces of information automatically. That monthly process saves about 12-16 hours alone!**

Square 9's solutions are being used daily across Harrison REMC with an average of 20 hours a week being saved. The Accounts Payable department is 20% more productive and documents that previously took 30-40 minutes to find, can be located in just a few minutes. GlobalSearch has been a safe, secure, and well-organized system that enables Harrison REMC to complete daily tasks more efficiently.

To learn more about Harrison REMC, please visit www.harrisonremc.com



20+ File Cabinets Eliminated

20+ Hours Saved Weekly



Interview: Rodney Brewer

Information Systems Coordinator, Harrison County

Q. What challenges influenced you to look for a document management solution?

Rodney Brewer: We really wanted to simplify our accounts payable process. We used to have a binder that got passed around once a week, depending on who needed to approve the invoices. Sometimes it would sit in one room for a while which would hold everyone else up. GlobalSearch allowed us to assign invoices to the appropriate approvers, so they can work them at their own pace without waiting on anyone else. The other challenge we were experiencing was space. In our Service Order Department specifically, we were running out of filing cabinets and we didn't have a good way to locate document information quickly. We wanted that peace of mind, knowing that documents were being archived properly and securely.

Q. Why did you choose Square 9 Softworks for your document management needs?

Brewer: We had two other competitors in the running and cost was one of the driving factors in us choosing Square 9. But if we had to do it all over again and cost was not a factor, we still would have selected Square 9 - we've been very happy with it. We like how customizable the Square 9 solutions are, especially because we use them for a lot of different processes. It's quick and easy to set up and customize an individual user's access controls and capabilities within the software. Being able to integrate GlobalSearch with ATS's OpenOne software was also a difference maker.

Q. How is your company leveraging Square 9's solutions?

Brewer: We use it in Accounts Payable for processing invoices, and also our Service Order Department for member documents, which includes anything from driver's license copies to applications for electricity. We use GlobalSearch for billing services to keep record of meter readings and be able to access that information instantly. We will soon start scanning in bank drafts, so if a member calls in and wants to set up automatic payments, we can securely store sensitive bank information.

Our easement paperwork used to take up three filing cabinets worth of space and in no proper order, so search and retrieval efforts would take a lot of time. Now we scan them in and index them based on what we call Map Location. Staff can now access any easement within seconds on our map through unique integration between Power Software and GlobalSearch.



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- Rodney Brewer
Information Systems Coordinator

Another place we started using GlobalSearch quite a bit is our Large Power Billing. Our meters out in the field talk to us remotely through cell modems and we've got another piece of software that reads all that data. But we'd still have to go in once a month and print that data out. It ended up being about 600 papers once a month, to pull out three different pieces of information for billing. So we set up a process of converting CSV files and PDFs for automatic OCR recognition to where now GlobalSearch instantly pulls those three pieces of information after a bulk scan. That's just once a month but it saves about 12-16 hours when we use it.

Q. Would you recommend Square 9's solutions and why?

Brewer: Yes, I definitely would recommend Square 9's solutions. Their software is very user-friendly and very customizable without a whole lot of technical skills. Square 9 Support is very good, which was also huge for us. Overall, we pretty much use Square 9 across the entire company and I would say at least 20 hours a week are being saved. We've gotten rid of about 20 filing cabinets so far and in Accounts Payable along we've experienced about a 20% increase in productivity. It's been a major timesaver for anyone trying to find an easement. Instead of spending 30-40 minutes on finding it they can complete their task in just a few minutes. On average company wide probably 5-10% more productive and have even freed up nearly a whole room that we are going to turn into a training facility. Overall, we are pretty happy!