

CREATING A PAPERLESS SOLUTION

Keeping important paperwork close at hand, yet secure, is a tough job for managers of any size company. A North Alabama software company has developed a program that can help.

By Kathy Hagood
Photos by Dennis Keim



Madison-based Cabinet NG helps small to mid-size companies and other organizations across the nation manage their documents electronically, speeding up workflow and reducing costs in the process.

The company's document management software is a stand-alone solution that integrates seamlessly with various computer programs used by financial, medical, legal, retail and manufacturing companies. The innovative software also is being used to manage the documents of state and local governments.

Cabinet NG's clients range from a Papa John's Pizza franchisee with 20 restaurants in the Southeast to Kirshon & Co., a CPA firm based in Poughkeepsie, NY. Alabama clients include Limestone County and American Behavioral Benefits Managers.

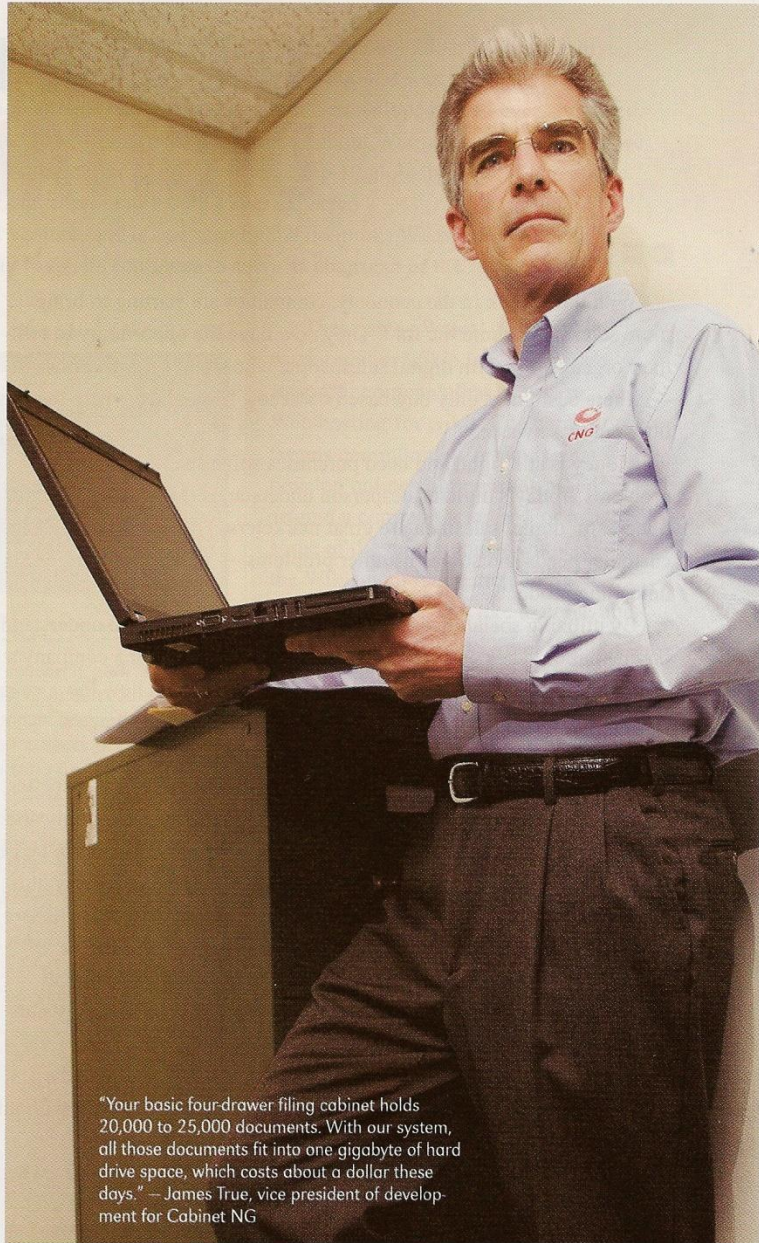
While the client base is diverse, the commonality among the businesses is the need for multiple users with various levels of authorization to be able to easily store and retrieve documents.

Because handling paper documents is time consuming and typically requires a significant amount of physical space, many organizations are opting to go paperless, says James True, vice president of development for Cabinet NG.

"Your basic four-drawer filing cabinet holds 20,000 to 25,000 documents. With our system, all those documents fit into one gigabyte of hard drive space, which costs about a dollar these days," True says.

Existing hard copies can be scanned, then stored offsite or disposed of, depending upon their importance and the organization's preference. Also, in some cases, the law may require keeping hard copies of signed documents.

"We don't tell companies to get rid of all their paper. We just work with them to reduce their use of paper to whatever point



that's practical and comfortable for them," True says. "We have various software products that can be phased in over time."

Birmingham-based American Behavioral Benefits Managers, for example, began using Cabinet NG's document management software in their claims department in August 2008. First came the management of scanned forms. Other document management functions were adopted over time, says Vickie Wood, senior claims examiner with the company, which processes behavioral health services claims and coordinates employee assistance programs.

Because of the success in the claims department, the company's other departments now are using Cabinet NG document management system.

"We've really been pleased with the way it works. It's saved us the equivalent of one full-time clerical position in our department alone," Wood says.

Any organization's electronic files and scanned documents can be named and filed methodically as they are created thanks to Cabinet NG's document management software. Because the naming and filing conventions are systematic, documents don't get lost in the shuffle. In addition, document workflow can be automated.

For example, after an employee makes out an expense report for travel, the report automatically can be forwarded for approvals and then sent to accounting. The status of the expense report can be tracked at any time.

"There's no guessing where a document is in the system. It can be pinpointed in the process at any time," True says.

However, not just anyone in the company can access that document or others in the system. Various

levels of authorization are designated for various files and documents. And staff members may view documents with permissions to read only, modify, create and/or delete depending upon their level of authorization.

"With our system, there's better protection against unauthorized users accessing sensitive information," True says.

The software also integrates with a company's backup procedures to keep data safe and secure. For companies that don't have an IT department, Cabinet NG offers an online backup solution.

"After Hurricane Katrina, for example, an insurance company we worked with was able to physically relocate to Texas and immediately get up and running again because of our online backup system," True says.

Saving space, increasing efficiency, reducing costs and providing better security are four major advantages of the company's document management system. Another is making compliance easier.

"Any audit process becomes more streamlined. With our system it typically takes one or two staff members to prepare for an audit, rather than having to enlist the entire staff to provide support," True says.

Cabinet NG's products allow companies to become so much more productive that there's a quick return on investment, he says.

"We recently worked with a private wealth management company with 27 branches, including 80 representatives and 120 support personnel. Their ROI took only four months," True says.

Much of Cabinet NG's business comes from referrals. Cabinet NG also works with resellers, companies who integrate Cabinet NG document management software into their business solutions packages.

"Potential customers can access a live demo of our system through our Web site," True says.

Currently, Cabinet NG has a staff of 20. The company launched in 1999 and within the past six years has seen growth of between 15 to 35 percent each year except last year.

"With the economy down, our sales were flat last year," True says. "But we're anticipating growth during the last half of 2010."

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*— Vickie Wood, senior claims examiner,
American Behavioral Benefits Managers*

Kathy Hagood is a freelance writer for Technology Alabama. She lives in Homewood.