

# Chetek-Weyerhaeuser Area School District

## Chetek, WI

Chetek-Weyerhaeuser Area School District (CWASD) represents students from Chetek and Weyerhaeuser, WI and surrounding areas. The combined district has 1,100 students and two facilities—a high school/middle school (Chetek-Weyerhaeuser High School/Middle School) and one elementary school (Roselawn Elementary).



“Having all our student records in an electronic format is a huge benefit to us. We can fulfill records requests so easily now. And having EO Johnson do the back file scanning of our old records is the reason the job got done, and done accurately.”

— Lisa Ippolite  
High School/Middle School  
Guidance Secretary, CWASD



## the challenge

To say that CWASD’s student records were a challenge for staff to work with would be an understatement. The District merged in 2010, and the combined Guidance office inherited student records that were stored in many different formats (binders and boxes, organized in alpha order or by year). All records were stored in a locked area, so fulfilling a records request started by physically leaving a desk, walking to the locked records area, pulling out keys, and unlocking the room. Then the real hunt began—where was the actual paper file stored? The process was labor-intensive and tiring and fell on the shoulders of three people who also had many other work responsibilities.

Backup of records was also an important issue. Outdated formats (microfiche and disks) had been used as back up for Chetek records. From the merger forward, school records were electronically stored on the CWASD’s system, so it was the back file scanning of old records that was a concern.

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## the solution

The District wanted all student records electronically stored in a consistent format and have those records properly backed up. Since scanning old records was a labor intensive process and CWASD didn't have extra employees, they needed a third party to do it. The District was already an EO Johnson customer and felt comfortable going into this project with them.

"The project EO Johnson stepped into was quite a challenge," said Lisa Ippolite, CWASD High School/Middle School Guidance Secretary. "The records were a variety of formats—one-sided, two-sided, small index cards, larger cards, and paper. EO Johnson worked with us to identify the best way for us to search the records and created a customized system based on our needs."

EO Johnson securely moved the files to their facility for the scanning process. If the District needed a file that EO Johnson had, they contacted the Scanning office, they retrieved the file and emailed a copy to the District. "Actually, they did this faster than it would have taken me here on-site," Ippolite said.

When the scanning was completed and the system ready to use, EO Johnson went to the District and trained users at the point of it going live. "The timing of the training was perfect," Ippolite said. "There is a lot in the system, but if I have questions, I simply call EO Johnson and it's answered quickly. Their service is excellent."

## the results

 **Time:** "I have gained a lot of time in my day now that I don't have to leave my desk to retrieve old paper files," Ippolite said. "All I do is click my mouse on my computer, and I easily get the record I need."

 **Paperless:** Going forward, Ippolite doesn't see the need to print paper files.

 **Security:** All files are secure and backed-up at two redundant locations.

 **Efficiency:** The District provides student records for their students, and having them electronically accessible makes this service easy to deliver.



# Wisconsin Rapids Public Schools

## Wisconsin Rapids, WI

Wisconsin Rapids Public Schools (WRPS) is a unified school district with a total enrollment of approximately 5,090. WRPS includes seven elementary schools, one middle school, one senior high school, as well as other specialized programs, 4K and virtual programming.

“It’s great to know that EO Johnson is certified to handle documents that contain confidential information—the whole process has been very simple and secure. Digitizing our documents has freed up physical space normally needed in file cabinet drawers, and we can more readily locate documents.”

— Maurine Hodgson  
Wisconsin Rapids Public Schools



## the challenge

Several departments within the WRPS District Office including Administration, Accounting, and Human Resources had a large dependency upon paper documents. Some Board records dated as far back as the 1930’s and some were stored on microfiche. The deterioration of this media was a serious concern. At some point the information stored on the microfiche would become unreadable and forever lost. Other hard copy records dating back to the 1960’s were also starting to degrade. WRPS decided something needed to be done to preserve this historic information.

Accounts Payable records included a wide variety of paper records as the documents were from multiple vendors used by the District. The information was very time sensitive. WRPS Board Members would often request information on previous month transactions for discussion in monthly Board Meetings. Accounts Payable staff needed to manually search for documents to fulfill these requests.

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Human Resources records occupied multiple file cabinets. As the hard copy documents continued to grow with the departure and addition of staff, the available space to store these records began to diminish. The records also had an extensive retention requirement, so creating more space by clearing old records was not in the immediate future. Retrieving information meant going into the cabinets to find files, and then searching for a specific document. This meant that not only space, but time was being occupied by the hard copy records.

## the solution

WRPS was an existing EO Johnson customer for Managed Print Services. Because of that relationship, they decided to give Document Scanning a try as well and continue working with a local partner. Preserving the oldest information was the top priority. Board records on both paper and microfiche were scanned and delivered as PDF files that were not only consistently named, but were also fully text searchable. “EO Johnson brought experience and knowledge, would find the answer if we didn’t know it, and would find solutions to what seemed like impossible problems” said Maurine Hodgson, Administrative Secretary, WRPS.

A monthly scanning program was established with Accounts Payable with completion within two days of receipt. To help offset the cost, EO Johnson provided the option for staff to perform their own document prep and trained them how to do it. Because all transactions were generated out of a core accounting system, WRPS would provide a data file each month to fully automate the indexing process to further offset cost. The output included PDF files that were custom named with check number, check date and vendor name.

Human Resources staff organized employee files into document type categories prior to scanning. After scanning, a 1:1 quality control review was done comparing every page to every image to insure all scans were complete, accurate and of the highest quality. WRPS also provided a database file to fully automate the indexing process. The finished product was one custom named PDF file per document type organized into folders for each employee. Human Resources records continue to be processed by EO Johnson on an annual basis.

## the results

 **Accessibility:** All information can now be accessed more efficiently. File searches for custom named PDF files enable staff to find specific documents faster without going through file cabinets.

 **Efficiency:** Accounts Payable records processed within two business days of receipt enables staff to quickly fulfill Board Member records requests.

 **Security:** All information, including historic records, is now preserved and protected as part of their regular data backup procedures.

 **Response time:** PDF files that are fully text searchable enable Administration and Human Resources staff to find specific pages within documents in a matter of seconds.

 **Valuable space:** Document scanning has greatly reduced the amount of space once occupied by these records.

# Charter Bank

## Eau Claire, WI

Founded in 1980, Charter Bank is an independently owned community bank with headquarters located in Eau Claire, Wisconsin and additional locations in Chanhassen and Chaska, Minnesota.



“The EO Johnson proposal was clear and concise and provided us with a clear cost for the project. There was also consistent follow-up throughout the process, and the project was completed on time and within budget. We highly recommend EO Johnson for these types of projects.”

— Wayne Richmond, Senior Vice President & Chief Operations Officer, Charter Bank



## the challenge

Office space is a valuable resource for all businesses. Hard copy records often consume a large amount of this resource, limiting the ability to grow or expand. This was the challenge that Charter Bank was faced with. Barb Crandall, Vice President of Loan Operations stated, “We were attempting to free up space in the bank for our remodel project and identified the loan room for the project. We wanted to get the files imaged to free up space.” The objective was to scan the records into Charter Bank’s Synergy software system.

The loan files were a mixture of documents from multiple categories. Some of the documents within the files were either old or non-essential, and really did not need to be scanned. Going through all of the records and then scanning the documents into Synergy using only internal resources would take a significant amount of time, delaying the remodel project.



## the solution

Time was of the essence, and a lot needed to be done to scan the files before the remodel project. The planning process was extensive. Charter Bank President, Wayne Richmond states, “EO Johnson invited us to tour their facility and meet staff. Everyone was very friendly and professional and answered all of our questions.” Through the discovery process, it was determined that the project would be a joint effort with both Charter Bank and EO Johnson playing key roles. Charter Bank established ten document types for the records, and designated staff to organize and purge the files. They also provided a database and sample documents to EO Johnson for testing and project configuration.

Producing a data output that would seamlessly integrate into the Charter Bank Synergy software system was step one. Following successful data testing, EO Johnson conducted on-site training for Charter Bank staff to organize the documents and accurately insert barcode sheets produced from the loan file database. EO Johnson would begin the process of prep, scanning, and quality control of over 175,000 total images as records were prepared by Charter Bank. The barcode sheets created an automated indexing process, saving both time and cost, and having both teams working simultaneously minimized the overall timeline for the project.

Accessibility to the records during the project was important to maintain customer service. Barb Crandall, Vice President of Loan Operations stated, “The whole process was very smooth and we felt confident that our files were always secure every step of the way. If we needed any files during the project, the EO Johnson team was able to get those to us quickly.”

## the results



**Efficiency:** Lenders and auditors can efficiently access loan data immediately in the Synergy software system, no longer relying on manual exchange of paper records.



**Space:** The file room remodel project began on time, and valuable space once occupied by the loan records has been reallocated to fulfill other business needs.



**Security:** All information is now preserved and protected as part of their regular data backup procedures.



## Prevail Bank Medford, WI

Founded in 1934, Prevail Bank is a federally chartered savings bank formed by the 2020 merger of Time Federal Savings Bank and River Cities Credit Union. Prevail Bank has offices in nine locations serving North and Central Wisconsin.

“We knew we needed to go digital and modernize our loan document files, but were nervous to coordinate such a large scanning project across our six locations. However, the scanning team at EO Johnson Business Technologies made the process extremely easy and efficient. They worked with us to really understand what we wanted and took time to design a project that achieved our desired end result.”

— Leigh Henline, Chief Credit Officer  
Prevail Bank



### the challenge

Accessing and sharing information from over 3,600 loan files was a challenge for Prevail Bank (formerly Time Federal Savings Bank). Hard copy records were stored on-site at each of their six offices throughout North and Central Wisconsin. “Moving paper was a challenge. We realized we needed to modernize—to go digital” says Leigh Henline, Chief Credit Officer. “We were starting to feel like we were running out of space,” she added.

Hiring staff or using internal staff to scan records seemed like a logical approach. But what about the logistics? Should the scanning be done at one location, or at each individual site? Scanning equipment would need to be purchased, staff would need to be hired and trained. Someone would also have to manage the entire project—it needed to be consistent. Security was definitely a concern as these were highly sensitive and confidential records. The finished data needed to reside in the FIServ Director system, and the process to get it there needed to be efficient, accurate and seamless.



## the solution

The process started with a meeting to establish goals and objectives for the project. Understanding the needs and expectations was essential in designing an approach that would produce positive results, and also would not be disruptive to the customers of Prevail Bank. In-depth site surveys were conducted at each location to determine the total scope of work. Test processing was completed on sample documents with the data successfully imported into the FiServ Director system. Prevail Bank was able to provide a database listing all loans. This fully automated the indexing process, and enabled EO Johnson to confirm that all files received were successfully processed.

Chief Credit Officer, Leigh Henline stated “It was simple, unexpectedly simple. What they could offer, it made sense.” Boxes were delivered by EO Johnson to each location with Prevail Bank staff packaging and taking inventory of each loan file. Nearly 170 total boxes were securely transferred to the Wausau, WI Document Scanning Office for processing. Accessibility to the records was always maintained. “If we needed something, they would send it to us. They were so fast about that. Faster than we could have even anticipated” added Henline.

Completed data consisting of over 410,000 total images was securely downloaded by Prevail Bank with seamless import into the FiServ system. Select hard copy documents with original signatures were pulled during processing and then returned to Prevail Bank for permanent retention. Random files were also delivered by EO Johnson after scanning for quality review. Complete satisfaction in the finished product was the primary objective. When records were ultimately destroyed several months later, Prevail Bank had the confidence that their documents were now safely in their system. Leigh Henline stated, “We didn’t have to hire or train anyone to do the scanning, it saved us a ton of time.”

## the results

 **Efficiency:** With loan information digitized and residing in their core system, access to this it is much more efficient for staff at all Prevail Bank locations. This results in a higher level of customer service.

 **Security:** All information is now preserved and protected as part of their regular data backup procedures

 **Space:** Office space once occupied by these records has now been reallocated to fulfill other needs.

# Chippewa Valley Electric Cooperative

Cornell, WI

Providing reliable and economically priced electricity to the rural areas, Chippewa Valley Electric Cooperative serves much of Chippewa County and small parts of Rusk, Taylor, Dunn, and Barron Counties. They have approximately 7,500 accounts and 22 employees.



“Moving all our documents to searchable electronic files was a big change. Through it all, EO Johnson was perfect—they walked us through the process doing everything they could do to ensure it was smooth and complete. Now everything is at my finger tips. As long as I have a computer and access to our VPN, I can work from anywhere.”

— Dean Ortmann, Office Manager  
Chippewa Valley Electric Cooperative



## the challenge

Chippewa Valley Electric Cooperative had a number of compelling reasons to move forward with a Document Management system. First, they were moving to a new facility and would no longer have storage space for old documents. Second, they submit a lot of reports to the government, and the government works electronically. And third, they needed a comprehensive way to scan and manage their documents.

The cooperative had started scanning documents themselves, but found the project outpacing what they were able to manage. Between the sheer volume of documents they had and the many different types of documents they dealt with, they knew they needed an effective way to manage their files as well as help with scanning their old records.

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## the solution

With a sizeable amount of records previously scanned, the new document management system needed to migrate existing documents into it as well as scan all new documents. In developing the structure for the system, EO Johnson spent time with employees learning how they searched for documents, what documents were most commonly needed, and how documents could be categorized.

“At any given moment we could have people looking for documents in a number of ways—we may need a member file, need to track down a work order, or understand an easement,” said Dean Ortman, Office Manager, Chippewa Valley Electric Cooperative. “When we need a record, we typically need it now, so the structure of our system had to be easy and intuitive to understand.”

An important consideration was the amount of old documents the Cooperative had that needed to be scanned. With only 10 office-based employees, the Cooperative looked to EO Johnson’s document scanning group to properly scan their old files into their document management system. It was at times tedious work—with many small documents and some stapled to other documents the scanning team had to examine every document and separate them if necessary.

## the results



**Convenience:** Employees appreciate the convenience of having documents scanned and available electronically. They can enlarge the smaller documents on their computer screens and no longer have to separate stapled documents.



**Accessibility:** Multiple people can access the same file at the same time others are, and employees no longer have to walk to and from file cabinets.



**Efficiency:** “I hardly go to the safe now for documents, because everything is scanned, I can stay at my desk and retrieve documents by clicking my mouse.”



## City of Rochester Rochester, MN

The city of Rochester, located in southeast Minnesota is the third largest city in the state, with a population of over 106,000. The city has a total area of just over 54 square miles and is the home of the Mayo Clinic.

“We have a productive and communicative working relationship with EO Johnson. They are business partners rather than a contracted vendor. Our data is now more usable, saving us time and effort. I am confident we chose the best company to meet our highly complex needs enabling us to effectively retain decades of information we would not have been able to manage on our own.”

— Rob Ronnenberg, Building Safety Department  
City of Rochester



### the challenge

Access to information and the ability to efficiently share it is vital to Government infrastructure. The City of Rochester, MN invested in a software system to digitize and manage day forward documents for multiple departments, making them more accessible and easier to work with. The challenge was all the paper records that they had accumulated up to that point. Getting this information into the new system was a key initiative. Additional reasons to digitize varied among the different departments. Building Safety, City Clerk, and Administration needed space to add staff and/or renovate—space occupied by paper records. Other departments such as Public Works and Human Resources had records that were accessed often, and by many people—getting them scanned into the document management software would create efficiency and cost savings. Over several years, departments such as Building Safety were then faced with relocating to a new building. With that move came the challenge of what to do with over one million standard size and large format documents that could not be included in the move. Multiple departments, each with their own unique types of records and needs.



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## the solution

The City of Rochester IT Department would begin by building the structure within the document management software for each department so that day-forward scanning could begin. The goal was to stop creating paper before starting the document scanning. Maximizing the funding allocated to scanning was also important. Rob Ronnenberg, Building Safety Department stated, “EO Johnson worked with us to identify areas that didn’t need scanning which will lead to greater savings.”

Each department and their records were unique. Collaboration with each department was key to not only meeting expectations, but to also identifying opportunities for automation. Database files generated from other core systems reduced or eliminated the manual process of hand key data entry. Multiple options for Quality Control enabled departments to customize how records were processed, giving more attention to the records that needed it most. Secure delivery of completed data with seamless integration to the document management software was essential. Extensive testing was done for each individual project and a standardized output format and secure delivery process was established. This helped minimize time spent by the IT Department working with completed digital files.

## the results



**Standardization:** Records from multiple departments now organized in one standardized document management system.



**Efficiency:** Information is accessed more efficiently and can be shared both internally and with the general public.



**Space:** Office space once occupied by these records has now been reallocated to fulfill other needs.

## by the numbers

- ✓ **Building Safety Department**
  - 2,239 total boxes
  - 3,383,312 total images
- ✓ **City Clerk** (standard and large format documents)
  - 169 total boxes
  - 369,512 total images
- ✓ **Public Works** (standard and large format documents)
  - 38 total boxes + 89 large format drawers
  - 67,591 total images
- ✓ **Water Plant** (large format documents)
  - 244 total images
- ✓ **Human Resources** (standard documents)
  - 97 total boxes
  - 249,064 total images
- ✓ **Administration** (standard documents)
  - 79 total boxes
  - 171,611 total images
- ✓ **Land Management** (standard and large format documents)
  - 330 total boxes
  - 493,710 total images



# Sauk County Treasurer

## Baraboo, WI

Sauk County, located in South Central Wisconsin, consists of 22 townships, 14 villages, and three cities. It has a total area of 831 square miles, with a population of over 60,000.

"The end result were beautiful, crisp scans that are now in a searchable PDF format. Without having the documents at our office, we have so much more space and we don't have to worry about spending time and money researching the document. I would definitely recommend EO Johnson for a document scanning project—the project was completed ahead of schedule, the scans were very clear, and the bid was very competitive!"

— Sarah Brown, Deputy Treasurer  
Sauk County Treasurer's Office



## the challenge

Being able to provide information to those that need it is a key element of great customer service. The Sauk County Treasurer's Office had over 1,000 books containing tax roll records dating back as far as 1965. Fulfilling requests for citizens was a manual time consuming process. Deputy Treasurer, Sarah Brown states, "We would take the call, figure out what the person was looking for, and then take it to the basement and search through thousands of records. We wanted these records available to the public so there was no need to contact our office and we could better use our staff."

Preservation of some of the oldest records was another top priority. Brown added, "Every time you touch paper it deteriorates, even in open air. Many of the old records were stained, written in pencil, and were deteriorating fast." The large amount of records also occupied valuable space in the Treasurer's Office which could be utilized for other needs. They knew it was time to make the transition from paper to digital, but how much it would cost was the biggest concern.



## the solution

Sauk County issued a Request for Proposal (RFP) with responses from multiple vendors from the Midwest. The process began with an in-person meeting to evaluate the Treasurer's Office needs and goals for the project. Deputy Treasurer, Sarah Brown stated, "EO Johnson asked questions and presented options the other vendors didn't even think of. They were very knowledgeable and understood what we were looking for." To minimize disruption at the busy County office building, books were picked up prior to the building being open to the public. Books were scanned with different levels of quality control with the oldest (lowest quality) documents receiving a higher level of review. Because cost was the primary concern, EO Johnson provided project updates every few days keeping Sauk County informed of where things stood at all times. Data was output as custom named PDF files that were fully text searchable. Two additional data outputs were also provided that would have compatibility for integration into a future document management system. All data was securely downloaded by Sauk County, and a portion of the books were delivered to the Wisconsin State Historical Society for permanent hard copy preservation.

## the results



**Efficiency:** Digital files have made the processing of public requests for information more efficient. It has minimized the amount of time spent by staff on these tasks, resulting in a higher level of customer service.



**Accessible:** PDF files that are fully text searchable enable staff to find specific pages within documents in a matter of seconds.



**Space:** Office space once occupied by these records has now been reallocated to fulfill other department needs.

# Northcentral Technical College

## Wausau, WI

Northcentral Technical College (NTC) is a public community college established in 1912. It is a member of the Wisconsin Technical College System. NTC has a main campus is located in Wausau, WI as well as six other regional centers across ten counties in north central Wisconsin, with a total enrollment of over 6,000 students.



“Northcentral Technical College made the right choice with selecting EO Johnson for our employee file scanning project which was verified throughout various steps in the project. They are reliable and provide excellent customer service in delivery of successful project in timely manner.”

— Cindy Thelen  
Human Resource Manager  
Northcentral Technical College



## the challenge

Ongoing process improvement and finding ways to be more efficient is essential to business success and growth. Northcentral Technical College (NTC) recognized this when evaluating the management of their records. Cindy Thelen, Human Resources Manager, explains “Our Human Resource Department was researching ways to automate and streamline processes within the College. As part of our process improvement and efficiency efforts, and to save space and update our disaster preparation, we sought to make the paper records electronically accessible from virtually anywhere.”

Having Human Resources records in hardcopy format was anything but efficient. Thelen states, “Paper records were cumbersome and hard to manage and maintain. Documents take time to get placed in the paper files due to the time commitment associated with manual paper filing.” Employee files consisted of multiple record type categories stored in individual folders, with some types filed in different storage locations.

The goal was to have records organized by document type, scanned and then imported into the NTC document management system. Working with a local resource with a high level of security were important parts of the decision of whom to partner with for the project. “NTC felt EO Johnson offered

the best customer service, provided a detailed quote, maintained confidentiality while handling of files and offered different levels of quality control to fit our various filing needs." Thelen said. "As an added plus, they were local and had worked with other schools and many banks who had more security measures and regulations, which gave us a comfort level that our confidential employee files would be handled appropriately."

## the solution

Because a majority of the Human Resources records were active files, the project strategy had to be designed based upon maintaining accessibility, enabling NTC staff to perform their daily work without delay or interruption. A project planning meeting was held that included both Human Resources and Information Technology, and sample records were processed and imported into the document management system for review. By having a clear understanding of how the paper records were organized, and how the document management system managed information, EO Johnson was able to work directly with NTC to develop a clear path to a successful project.

Records would be processed in smaller groups to minimize the amount of files offsite for scanning at any given time. EO Johnson staff provided boxes, collated, and packaged files from the different storage locations. NTC provided a database file to fully automate the document indexing process to save time and offset cost. After scanning the documents, both Premium Level and Basic Level Quality Control were performed based upon record type also providing a cost savings to NTC.

The data output was formatted for seamless import into the NTC document management system with secure incremental data deliveries via Secure File Transfer Protocol (SFTP). When scanning active files, data was delivered daily so that NTC could quickly access information in their system. Any exceptions identified during processing were promptly reported to NTC so that every file was accounted for. Thelen stated, "EO Johnson had great communication through the entire project including providing status on the percentage of the project complete along with targeted budget updates on whether we were trending high or low as our project moved along. They worked in collaboration with the project deliverables to offer solutions, resolve even the smallest of issues, and offer feasible alternatives to improve the project while exhibiting a can-do attitude."

EO Johnson retained all documents after scanning was complete and provided confidential destruction services following NTC signature approval. A total of 136 boxes were scanned, producing over 327,000 total completed images.

## the results

-  **Accessibility:** "NTC's scanning project wrapped up about two months prior to COVID-19. The Human Resources department has been working remotely from home on a temporary basis and having electronically accessible files has enabled the staff not to miss a beat with accessing necessary employee information in the files. It has already proved to be more than beneficial."
-  **Efficiency:** "This was the first step for Human Resources to become paperless and this project created a tangible vision for future efficiencies and process improvements. The HR files are now easily maintained and up-to-date at any moment."
-  **Valuable Space:** Office space once occupied by these records has now been reallocated to fulfill other needs.
-  **Data Integrity:** "EO Johnson worked closely with the college and stayed in continuous communication with HR to ensure the project remained on schedule while ensuring all data adhered to our standards."
-  **Security:** All information is now preserved and protected as part of their regular data backup procedures.



## Ruder Ware Law Wausau and Eau Claire, WI

With over 40 attorneys and 90 years of experience in serving business owners and individuals, Ruder Ware has established itself as one of Wisconsin's largest and most successful law firms. With offices in Wausau, Eau Claire and Green Bay, Ruder Ware guides clients through intricate legal issues around the world.

"EO Johnson brings an integrity and resourcefulness to the table when it comes to scanning our documents. The excellent client service, the continued quality of the scanned documents we have received, the level of protection of our private client data, and the care of the people we directly work with at EO Johnson continue to bring us back each year to work with them on our projects."

— Angela Mothes, Office Manager  
Ruder Ware Law



### the challenge

Before scanning client files to digital format, working with hardcopy records was time consuming for Ruder Ware Law staff. Angela Mothes, Office Manager, describes the process, "If an employee needed a document from a paper file they would first need to request the file, the Records Department would then pull the file, check it out, and bring it to the employee. After searching for a specific document, the file would then be returned and re-shelved."

Ruder Ware also wanted to provide their staff the ability to access information simultaneously so that attorneys can collaborate from wherever they were located. Mothes states, "We encourage our employees to operate in a paperless environment. We also want to make it easy for our attorneys to be able to access client files remotely."

In a number of litigation matters, attorneys must request any documents related to the case from opposing counsel. These documents are called discovery documents and they too presented challenges for Ruder Ware. "In many instances, discovery documents come in large quantities of papers, files, and banker boxes in paper format. The firm has a set window of time to review and return these documents," says Mothes. Because discovery documents were in paper form, the review process was much slower and inefficient, making the deadline for returning the records all the more imposing.



Digitizing records represented a cultural shift for Ruder Ware. Each client record was unique and contained a wide variety of sub-folders and page sizes based upon the complexity of the case. Electronic records would have to be consistent, and the conversion process would need to be seamless to make the transition as easy as possible.

## the solution

The process started with establishing goals and objectives for the project. Understanding the needs and expectations was essential in designing an approach that would be seamless, would produce positive results, and would make the transition to digital records easy for Ruder Ware staff. Client files were thoroughly reviewed and an indexing structure was established. Ruder Ware would provide a database file with detailed information for every file sent for processing. This minimized the amount of manual hand-key indexing, saving considerable cost.

“We appreciate how the EO Johnson Scanning Team listens to us. If we have questions on how best to manage our file scanning based on a limited budget, or ideas on how additional information may be beneficial, they listen to us, discuss our options, and provide us with a well-considered and thorough answer. Not only do they work with us effectively, their response time is phenomenal,” says Mothes about the planning and implementation process. Records were scanned and Premium Level Quality Control was performed with a one-on-one review comparing every hardcopy page to every scanned image. Mothes adds, “You will not find a more organized, well thought-out and seamless process for handling your scanning needs. The quality of their scanning is excellent.” The client file data was output as custom named, text searchable PDF files within an organized folder structure. The delivery process is secure with Ruder Ware downloading the completed data directly from the EO Johnson server.

For the discovery documents a structured program was established that would meet deadlines and provide data back in a way where the attorney review process would be most efficient. Angela Mothes describes, “They make the process simple for us. We call them, they pick up the records and scan them in the time we have allotted to have the discovery records, and they return the physical documents and scanned documents to us in an organized manner. It is all seamless.”

Since 2016, over 620 boxes have been scanned, producing over 1.3 million total images. “In the time I have been working with the EO Johnson Scanning Team, they have definitely exceeded my expectations, and continue to do so each year. I have never worked with a team with the level of understanding, care, and organization as EO Johnson. Their operation appears seamless to our Records Team, and we have complete trust in working with them on our projects,” says Mothes about the experience.

## the results

 **Accessibility:** “We are able to accommodate our attorney needs by having our client files readily accessible, in a searchable format by having them scanned. When we have multiple attorneys or paralegals working on the same client matter, they can all easily access up-to-date documents from the electronic file, making them more productive.”

 **Efficiency:** “Now, employees can find files in a shorter amount of time by directly accessing the electronic files from their computer. This requires less staff time and less process laden tasks. The employee can retain the document they need more efficiently and thereby, move on with their immediate work.”

 **Valuable Space:** “Our firm is also able to reduce the physical space needed to store physical client files, thereby saving money that can be better used throughout the firm.”

 **Response Time:** “We know we can count on EO Johnson to work us into their schedule, and get these documents scanned when needed. Having this service available is valuable to our attorneys and staff.”

 **Security:** “Scanning closed client files has also reduced the need to destroy older files to make space for newly closed files. Now, if an attorney were to need an older client file, he or she can easily access it in a scanned format without the concern that the file has been destroyed.”



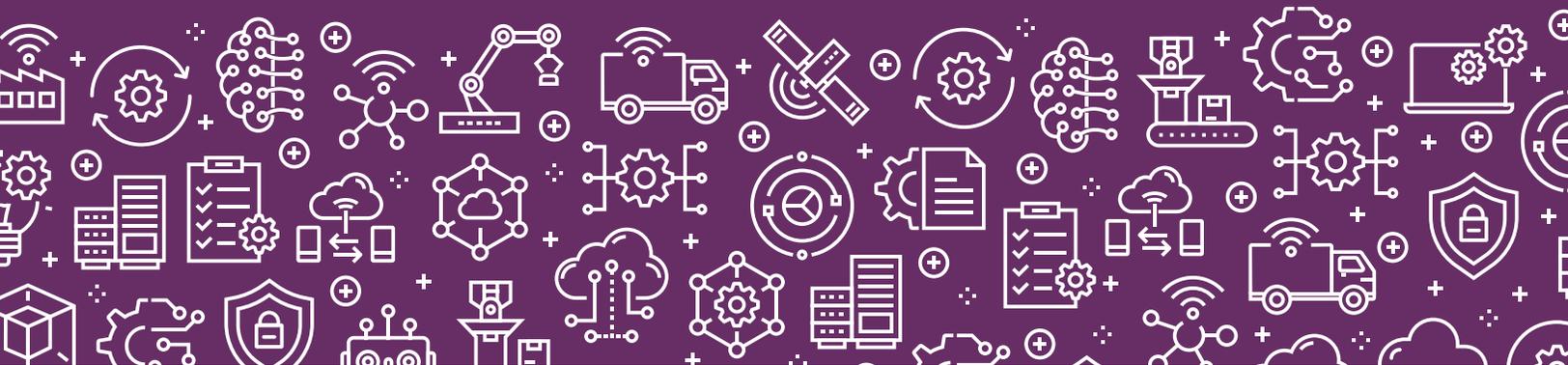
## RTP Company

Winona, MN

RTP Company, headquartered in Winona, MN, is a global compounder of custom engineered thermoplastics. The company has over 20 manufacturing plants located in the United States, Mexico, Europe, Singapore and China. RTP Company's engineers develop customized thermoplastic compounds in over 60 different engineering resin systems for applications requiring color, conductive, elastomeric, flame retardant, high temperature, structural, and wear-resistant properties. They have over 1,700 employees worldwide.

“Document Scanning was a very organized and easy process—I would absolutely recommend EO Johnson. The finished product is great! These documents can then be seen by each location worldwide, and it is much easier than going through the library and looking for the hardcopies.”

— Jennifer Duffy  
Maintenance Materials Coordinator  
RTP Company



## the challenge

RTP Company is headquartered in Winona, which is the company's largest production location with over 375,000 square feet. The plant manufactures their complete product line and provides support to customers throughout the Midwestern United States. The manufacturing process is supported by an extensive network of highly specialized equipment throughout the plant. Service manuals for the equipment were stored in hard copy form in a library within the plant and maintenance staff would access them often to perform service and repair. The manuals contained not only standard size pages, but also 11x17 and larger size documents. These hard copy documents were the only set of information and would not only be used throughout the plant, but also in other plants utilizing the same equipment. This made the records very vulnerable to being misplaced or lost.

Jennifer Duffy, Maintenance Materials Coordinator describes the challenges the paper records presented, “There was always an issue with manuals and missing pages. Sometimes manuals would have to get shipped back to Winona, or you would have to call the manufacturer and get a copy.”

## the solution

In manufacturing, equipment down time means lost production and lost revenue. Having immediate access to service information is essential in addressing problems and resuming production quickly. RTP Company recognized that digitizing their library of service manuals was a key step in addressing this area of need.

Preserving these vital documents was the primary goal. The first step was to determine the most cost effective way to digitize the manuals, this meant RTP Company getting involved in the process. Jennifer Duffy explains why she chose EO Johnson for this project, “I chose EO Johnson as a resource partner because of the fast turnaround, delivery service and overall presentation. It was a very organized and easy process. Everything was explained very well.”

EO Johnson provided RTP Company with barcode sheets and a database file. RTP entered all of the naming information into the database including description, model numbers and asset numbers. The barcode sheets which corresponded with the database, were inserted into the documents and the pages were removed from their covers. This greatly reduced the cost of Document Prep, and enabled EO Johnson to fully automate the Indexing process. Records were securely transported to EO Johnson for processing and remained accessible during the project in case they were needed. After scanning and performing a Quality Control review of the records, the finished data was produced—custom named PDF files that were fully text searchable. RTP Company securely downloaded the data from EO Johnson and the hard copy documents were returned.

Jennifer Duffy, Maintenance Materials Coordinator summarizes the positive results achieved by scanning, “We have a new maintenance system and can attach each document to the piece of equipment it belongs to. Maintenance staff and electricians can then look up information about machines as they are working on them. This makes it much easier than going through the library and looking for the hardcopy. Having the records electronically is very useful, especially for myself.”

## the results



**Efficiency:** PDF files were integrated into their primary asset management system creating a single source for all equipment information.



**Accessibility:** Manuals can now be accessed by multiple people, regardless of location without risk of records being lost or misplaced.



**Security:** This information is now protected as part of their regular data backup procedures.



## W.S. Darley & Co. Chippewa Falls, WI

W.S. Darley & Co. manufactures fire pumps and fire trucks and sells fire-fighting equipment to fire stations throughout the world. They also provide a variety of products to the U.S. Department of Defense. In business since 1908 and headquartered in Itasca, IL, they have manufacturing facilities in Chippewa Falls, WI and Janesville, IA. They have approximately 225 employees.

“We had a lot of sales and service history that was only available on paper. If a paper file got lost or misfiled we would not be able to access the information it contained. We needed to have those files scanned into electronic files and didn’t have the resources to do that ourselves. We looked to EO Johnson to do that for us.”

— John Long  
Systems Administrator  
W.S. Darley & Co.



### the challenge

With over a century in operation, W.S. Darley & Co had a lot of sales and service history that was only available on paper—nearly 60 file cabinet drawers filled with hardcopy records. These documents were the only set of records and required permanent retention. Their products have a very long life in the field so it can be many years before a customer requires service parts.

“One of the risks we faced with paper documents was if a paper file got lost or misfiled,” said John Long, Systems Administrator at W.S. Darley & Co. “If that happened and that customer needed service we would not have the necessary information. We wanted to modernize our records and that meant electronic files.”

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## the solution

Long knew they did not have the personnel or equipment to do the size of scanning project they had themselves so they turned to EO Johnson's Document Scanning and Conversion for assistance.

The first step was to work with EO Johnson to determine a plan of action. Having a clear process for the handoff of files to EO Johnson was critical as if the need for customer service arose employees would need to access service part history data.

To offset the cost of automating the indexing process, Long provided EO Johnson a database listing all of their pump serial numbers, model numbers, customers, and year of production. This manifest was used to check out the documents to EO Johnson for scanning and then again used when the files were returned to ensure all the files were returned. The contents of file drawers were transported to EO Johnson for scanning at their secure facility. Once scanned the images could be downloaded and stored on W.S. Darley's file servers and SharePoint site. Going forward employees will scan new records themselves.

## the results

-  **Efficiency:** Employees are now able to search for, retrieve, and distribute information right from their desks.
-  **Accessibility:** Files can be accessed by multiple people simultaneously, and there is no risk of files being lost or misfiled.
-  **Security:** Their files are now protected as part of their regular data backup procedures.

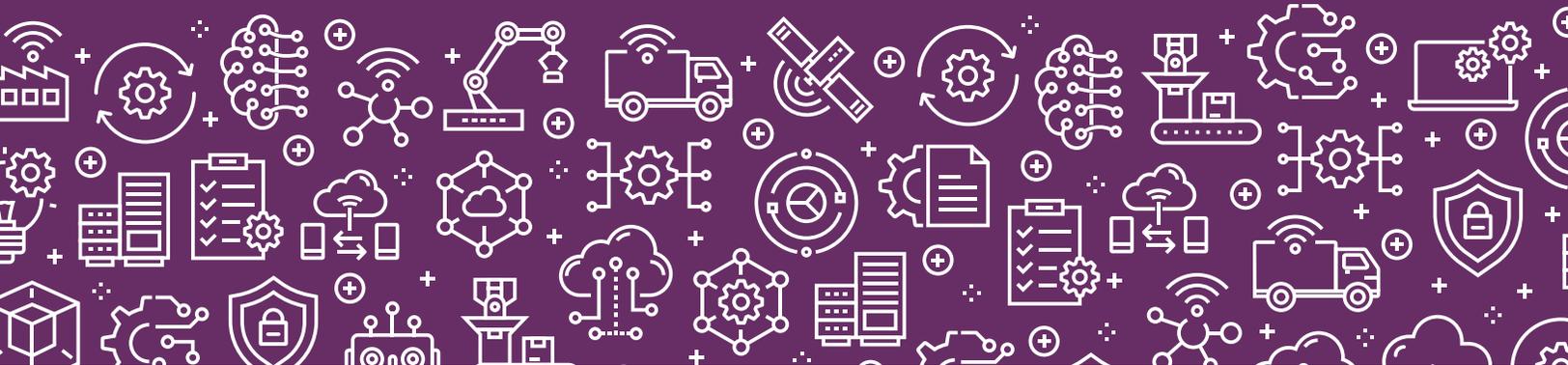


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