Capturing Information from 175 File Cabinets & 70,000 Files

PSIGEN's Paperless Solution Alleviates Challenges and Saves Physical Space

Kimball, Tirey & St. John LLP (KTS) is a full-service law firm representing owners and managers of commercial and residential real estate throughout California. Several associates have backgrounds in property management and are able to use their expertise to provide premium legal services in the real estate industry.
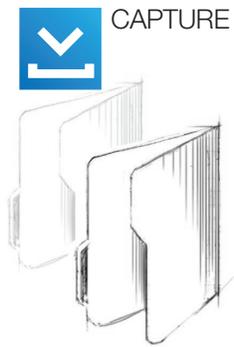
The Problem

Keeping paper documents organized and maintaining enough space for them was a considerable challenge for the Collection department at Kimball, Tirey & St. John LLP. Additionally, the process of retrieving files from the paper archives was consistently time intensive. "It became very challenging to keep 70,000 physical files in order. The information was not readily available while the employees were on the phone. It also became expensive to warehouse 175 file cabinets," said Brian Stevens, Director of Business Development. Employees often needed to access documents in order to defend clients and reference claims in the event of a dispute, which resulted in constant back and forth from desks to filing cabinets. KTS first attempted to alleviate these problems by increasing staff size to assist with organization. As space restrictions and the lack of efficiency became overwhelming, finding a paperless solution was critical.
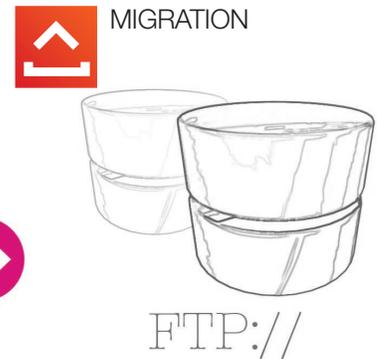
Solution Requirements

Kimball, Tirey, & St. John needed a system that would save space, boost accessibility to client documents, and transform filing and locating documents into a seamless and dependable process. An integration of a paperless system to help the Account Executives achieve greater productivity and customer service was the firm's main goal.

PSIGEN software inc.

CAPTURE

OCR

PSIcapture

MIGRATION

FTP://

After documents are scanned using the scanners, they are uploaded into PSIcapture's user interface for processing.
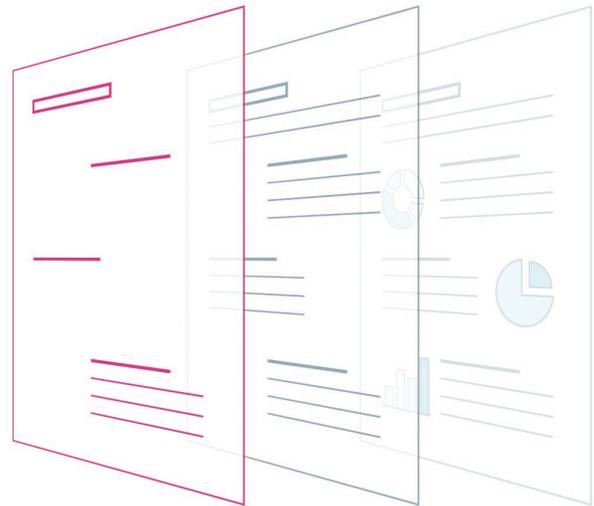
PSIcapture's robust feature set, including the OCR Module, reads, indexes and classifies the documents for efficient filing.

The files are migrated to a web-based document retrieval system to allow immediate access to files.

The PSIGEN Solution

When KTS began sifting through available solutions, PSIGEN stood out as an option they were able visualize working for them right away. "We were impressed with the openness of the architecture and the simplicity of the system as a whole," said Stevens. With 1 Kodak scanner, 2 Canon scanners and PSIGEN's PSIcapture, the electronic solution solved the firm's previous organization and accessibility issues. Paper documents are scanned into PSIcapture, named, and stored in a web-based retrieval repository where a powerful query engine can locate and retrieve documents in seconds. "Our Account Executives can discuss any and all specifics about a case while they have the tenant on the phone. In the past, they would have to retrieve the file then return a phone call," explained Stevens. The integration of the PSIGEN solution has been so successful in the Collection division that KTS has since expanded its use into the Accounting and Human Resources departments.

Conclusion

The physical space saved and the increased efficiency have been the greatest benefits PSIGEN has brought to Kimball, Tirey & St. John LLP. The firm now enjoys reduced labor costs, improved time management and higher customer satisfaction.

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Solution Components in Summary:

Capture Software:	3 PSIGEN PSI**capture** Enterprise Workstations
Content Repository:	Web-Based Document Retrieval
Scanners:	2 Canon DR9080c Scanners, 1 Kodak 3520 Scanner

About PSIGEN Software, Inc.

PSIGEN is the innovative leader in advanced capture applications dedicated to helping companies automate document processing by extracting data and utilizing it to name, index, format and route documents along the electronic path to storage. The lasting result is a more productive end user, using fewer mouse clicks and keystrokes, accomplishing complex and powerful document workflows. Our largest customers include service providers, business process outsourcers and major corporations.

We have significant customer concentrations in financial services, healthcare, manufacturing, retail and energy. Our channel partners include document imaging value added resellers, major brand MFP dealers, Microsoft solution providers and document management software vendors.