

A wide-angle photograph of the New York City skyline at sunset. The sun is low on the horizon, casting a golden glow over the city. The Empire State Building is prominent on the right side of the frame. The sky is filled with soft, orange and yellow clouds.

# Transforming Document Management for a New York State Government Agency with CASO Document Management



## CLIENT

New York State Government Agency

## PROBLEM

Managing 7 million scattered paper records caused delays, hindering efficiency during office relocation.

## SOLUTION

CASO digitized records with EasyFile, a secure, searchable cloud-based document management system.

## BENEFIT

Faster access, better security, and streamlined workflows.

## CLIENT OVERVIEW

A proactive New York State Government Agency, employing over 575 staff, is committed to fostering a robust and inclusive state economy. As part of their office relocation to a smaller space, the agency identified an opportunity to revolutionize their records management system. Transitioning from a cumbersome physical archive to a sleek electronic filing system with EasyFile, they aimed to boost efficiency, enhance security, and reduce costs, all while optimizing their office layout.

## THE PROBLEM

Relocating to a new office meant addressing the logistical nightmare of managing seven million pages of paper records, historically stored haphazardly across multiple locations. This archaic system caused significant operational bottlenecks, particularly for the Legal Department which required daily access to a vast array of documents. "The move was a catalyst for change to digitize our workflow and enhance accessibility," noted an Agency's Employee.

## THE SOLUTION

CASO Document Management introduced EasyFile, a robust cloud-based solution tailored for seamless business record management. Recognized for its reliability (with an uptime exceeding 99.9%), EasyFile was poised to transform the agency's operational framework.

The digitization process was spearheaded by CASO's onsite scanning

Uninterrupted access to  
data improved  
productivity



7 million pages  
processed



Labor cost reduced



**“The integration of  
EasyFile not only  
streamlined access but  
also fortified our data  
security protocols.”**

- Project Manager at New York  
Government Agency

services, meticulously converting all paper records into digital formats at a remarkable pace of 40,000 pages daily. Key features of EasyFile included:

- **OCR Search Capability:** Facilitating the swift location of documents through searchable text within images.
- **Enhanced Document Security:** Ensuring that sensitive information remained accessible only to authorized personnel.
- **Intelligent Digital Retention:** Automating document review and purge cycles based on document type.
- **Secure Record Sharing:** Enabling controlled access through password-protected, time-sensitive links.
- **Advanced AI Functionality:** Allowing for thematic searches across records, crucial for identifying potential compliance risks.

“The integration of EasyFile not only streamlined access but also fortified our data security protocols,” stated by one of the Agency project leads.

#### IMPLEMENTATION AND IMPACT

The rollout of EasyFile was seamless, with each department receiving tailored training sessions complemented by a Quick Reference Guide. Continuous support ensured a smooth transition.

- **Elevated Productivity:** Staff retrieved documents within seconds—a dramatic improvement from the previous system.
- **Assured Business Continuity:** The cloud-based nature of EasyFile provided uninterrupted access during remote work periods necessitated by the Covid-19 pandemic.
- **Efficient Data Management:** Processing and organizing 7 million pages into 1.1TB of data across 15 departments was executed flawlessly.

This initiative was not only about going digital but also revolutionizing how the Agency managed information.

#### About CASO DOCUMENT MANAGEMENT

Since 1994, CASO has been at the forefront of document management innovation, providing tailored solutions across various sectors. Their expertise is backed by a century of combined managerial experience, ensuring scalable and effective solutions for every client.

For further information about our services and how we can assist your organization, contact us at (888) 388-2276 or visit our website at [www.caso.com](http://www.caso.com).