



The YMCA of Greater Pittsburgh Digital Transformation with EasyFile Case Study



CLIENT
YMCA of Greater Pittsburgh

PROBLEM
Valuable space required for storing paper files with limited access by HR staff working in separate facilities

SOLUTION
CASO document scanning services that converted all historic and active HR files to digital format for storage into their EasyFile document management solution, providing secure, searchable, electronic records to HR staff regardless of their location.

BENEFIT
Reduced document storage space and building leasing costs while streamlining HR operations.

CLIENT OVERVIEW
The YMCA of Greater Pittsburgh is part of the global YMCA network, which is one of the largest organizations focused on youth development, healthy living, and social responsibility. They employ 150 full-time employees and over 1,000 part-time employees with a membership of over 19,000 individuals across its 6 YMCA locations and 2 camps.

PROJECT OBJECTIVE
To modernize the YMCA of Greater Pittsburgh’s Human Resources (HR) operations by transitioning from physical document storage to a digital document management system, enhancing efficiency and accessibility of HR records, while reducing the space required to store their records.

THE PROBLEM
The YMCA of Greater Pittsburgh had an initiative to reduce their physical office space, allowing employees to work remotely or at YMCA locations closer to where they live. This required a digital platform for their Human Resources records to allow easy access to files by employees that are not all working in a central location. The physical HR file storage consumed valuable space and complicated document retrieval.

Reduced space requirements for physical records helping to lower facility leasing costs by 90%



Allows secure access to HR electronic records from various locations



Reduced operational costs by streamlining organizational processes



THE SOLUTION

CASO Document Management was pivotal in transforming the YMCA of Greater Pittsburgh's HR operations providing document scanning services and a secure EasyFile document management solution. By centralizing all digitized HR files in a secure, cloud-based platform, EasyFile streamlined document storage and retrieval. Robust security measures protect sensitive documents. User-level access controls ensured only authorized personnel could access HR files, while document-level protections safeguarded highly confidential records like I9s. The system also included a built-in disaster recovery solution, ensuring critical data was backed up and protected against unexpected disruptions. Retention Management can be applied to their HR records allowing reports to be created for files that have met their retention, ensuring document management retention compliance.

BENEFITS REALIZED

The implementation of this document management solution brought several significant advantages to the YMCA of Greater Pittsburgh:

1. Space Optimization: The elimination of physical HR files freed up valuable space that can now be repurposed for other uses.
2. Disaster Recovery: The EasyFile system's backup process created a disaster recovery solution for all HR files, ensuring data safety and continuity.
3. Improved Accessibility: HR staff now have efficient and quick access to files through multiple index fields and full-text search capabilities.
4. Enhanced Security:
 - User security settings in EasyFile protect HR documents, allowing access only to employees with proper permissions.
 - Document-level security enables I9 documents to be merged with personnel files while restricting viewing to HR administrators with appropriate clearance.
5. Streamlined Operations: EasyFile provides fast and secure access of files for the HR staff, regardless of their location, improving overall HR operational efficiency.

CONCLUSION

The YMCA of Greater Pittsburgh's adoption of CASO Document Management's scanning services and EasyFile system demonstrates a successful digital transformation in HR document management. This initiative not only modernized their operations but also enhanced security, accessibility, and resource utilization, setting a strong foundation for future organizational growth and efficiency.

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.

“EasyFile has streamlined our HR operations, providing fast, secure access to files while saving space.

The disaster recovery and advanced security features give us confidence in our document management processes.”

- Jeff Longmore, HR Associate,
YMCA of GREATER PITTSBURGH