

DocuLex and Ricoh Clean Up Document Handling and Preservation at Lake County Water Authority

The Lake County Water Authority in Tavares, FL, is a local government agency that was created in 1953. Its overall initiative is to improve the streams, lakes and canals of Lake County in order to:

- Control and conserve the freshwater resources
- Foster and improve the tourist business
- Provide recreational facilities for tourists, citizens and taxpayers
- Improve the fish and aquatic wildlife
- Protect the freshwater resources through assisting local governments in the treating of storm water runoff

The Lake County Water Authority owns thousands of acres that it works to maintain and preserve for people to enjoy, and this includes treating water sources on this land to make safe for all whole use them – from wildlife to the weekend camper.

At the Lake County Water Authority, Ben Garcia wears many hats. In addition to preparing maps and data to share with the County and post on its website, Ben handles all computer and network needs for the Authority, to include making choices for hardware and software that will improve its business processes, further enabling the Authority to meet its goal for improving Lake County's streams, lakes and canals.

In 2007, Ben and staff determined the Authority was in need of a new copier. Through the government bid process, careful product evaluation and Ben's foresight, what he procured was much, much more than just a copier.

The Challenge

As a government agency, the Lake County Water Authority is required to retain critical records according to retention "schedules" issued by the US Government. These retention schedules are a series of specifications on how different documents need to be categorized for archival, and how long these records must be kept for needed access. Retention schedules can be over 100 pages in length, and contain over 100 categories to choose from for proper document designation.

Thousands of large maps, extensive tables and lengthy reports are among the commonplace documents to be found at Lake County Water Authority. To archive these documents, manual navigation of the retention schedule to determine proper designation of the document was required - a daunting task that drained significant amounts of time from Lake County's knowledge workers. Once archived, the Authority had to retrieve source files manually when required, and make copies for fulfillment of these document requests.

In addition to the need for a new copier, Ben understood that digitizing these documents to be stored electronically would be very effective in meeting the requirements of the retention schedules, fulfilling document requests, and aiding significantly in decreasing the amount of files on site – which amounts to 20 x 30' room full of paper. Would it be possible to find such a solution with a limited government budget?

The Solution

Ben issued a bid for his copier and a document management solution. After several bids from different companies state-wide, Ricoh Americas Corporation was selected as the very best solution for his dollar. The local Ricoh representative carefully reviewed the Authority's retention requirements, and suggested Ben add the DocuLex Archive Studio™ software package to his program, to be used in concert with the Ricoh MP C4500, a multifunction document imaging system with a wide range of capabilities to enable the best in enhanced workflow.



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DocuLex Archive Studio enables records management by allowing its users to easily declare and classify documents for secure electronic storage and retrieval. With this solution, the Lake County Water Authority can tightly control and direct the flow of its documents - from capture and indexing, to access, retrieval, and policy-based destruction per the specified retention schedule parameters.

By combining the DocuLex Archive Studio software with the Ricoh MP C4500 hardware, the Authority can automatically scan a document or batch of documents, designate a classification for the file or document per the required retention schedule, convert those documents to fully searchable PDF files, and archive per its customized filing requirements.

Using Goby Capture™, a component of the Archive Studio software, the Authority uses a profile sheet or template for addition to a document or stack of documents to be scanned on the MP C4500. This barcoded sheet includes selectable custom index metadata specified by the Authority - information about what is contained in the document, how it should be categorized and where it should be filed electronically. This profile sheet is recognized by the software when it is scanned. The software then performs OCR on the scanned document and automatically files the document(s) on a secure centralized server per the profile sheet specifications as a fully searchable PDF. Using WebSearch™, a 100% browser-based component of the DocuLex Archive Studio product, Lake County employees can then easily locate documents through document-specific descriptions or a combination of keywords via a secure Web browser. WebSearch is permission-based per Ben's specifications to share across the organization. In addition to the reports, maps and tables that are electronically filed using Goby Capture, the Authority can archive its e mails and attachments using the same pre-determined filing structure through Archive Studio, and retrieve these files in the same fashion as its other documents using the WebSearch component.

The Results

Said Ben, "By combining the DocuLex Archive Studio software with the MP C4500, we ended up with a complete package for addressing our needs of more effective document handling and retention overall. Both DocuLex and Ricoh provided support that enabled us to customize the system to our critical specifications, and have allowed our staff to realize the value of such a system in short order. The combination provides fast and easy retrieval to comply with internal and public requests for information, while at the same time meeting the requirements of the retention schedule - which is no small feat. The DocuLex team worked side by side with us on programming to best fit our needs, and is able to provide support whenever the Authority needs it – even remotely. We are now getting rid of a lot of paper that is difficult to handle, manage and store, and we are complying with government-issued requirements. Our staff is saving precious time finding documents, freeing up resources for other projects, and we are providing better customer service when responding to public requests. Record keeping is more effective and we have backup for our files in case of a fire or weather event. We know now that if we want to find a document quickly and be sure it is going to be there for a long time, the Ricoh/DocuLex combination will enable us to do this."

About DocuLex

Established in 1996, DocuLex provides industry acclaimed document management software. DocuLex's complete solution addresses the business need to effectively manage scanned documents, electronic files and email. DocuLex software is utilized by a wide range of industries, and has a user base that includes everything from small businesses, departments within companies to enterprise-wide installations. Achieve instant document access - anytime, anywhere.

For further questions please contact info@doculex.com

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