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Case Study

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General Information

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On A Mission To Create A Paperless Office

Cabinet NG Keeps Insurance Company On Track



For more than a decade, businesses nationwide have discussed reducing their carbon footprints by implementing a paperless office. Yet, according to environmental organizations, Americans still use more than 50 million tons of paper each year, and global consumption is about 400 million tons a year.

Maya Assurance, headquartered in Long Island City, N.Y., needed to launch a paperless office as soon as possible. Cabinet NG (www.cabinetng.com) had the products to make it happen.

■ The Challenges

“For our particular scenario—a small and growing company—our most pressing problem was storage,” says KJ Singh, vice president at Maya. “We had originally reserved 20% of our office space for files but quickly realized that we would need a lot more than that. The additional shelves and filing cabinets needed to keep pace with our growing business would have required us to move to a larger office space very soon. For a new company, a premature investment in a larger office would have slowed our growth.”

Maya considered developing custom software programmed from scratch. “We also looked at additional off-the-shelf software products,” says Singh, “but the initial costs were prohibitive. Plus, the other products still would have required considerable customizations to fit our needs.”

Singh says that after comparing multiple products, Maya’s team selected CNG-SAFE (Shared Access Filing Environment) for multiple reasons. First, it was easy to customize the application without major development. Maya Assurance did not have to hire a dedicated programmer to make the product fit its needs. Second, the core platform was stable and flexible enough such that the company did not have to invest much time or money in starting up.

And third, CNG-SAFE allowed Maya to use its built-in management console to create user accounts, assign security rights, and develop an e-filing infrastructure to fit Maya’s needs. “With our experience with IT, CNG’s setup was extremely user-friendly,” says Singh. “There was minimal training required for the support staff to implement CNG-SAFE.”

Another plus, adds Singh, is that because each department has its own requirements, CNG-SAFE allowed the company to design the e-cabinets accordingly. There was no one-size-must-fit-all with the software. “Once each department defined its needs, with minimal setup time, we were able to implement CNG-SAFE.”

Insurance companies have many regulatory requirements, such as document retention, which dictates that documents must be retained for six years. Thus, simple document archiving was Maya’s original reason for purchasing CNG-SAFE.

"Our next goal," Singh adds, "was to incorporate these new technologies (such as CNG, for example) into our business operations and save the company considerable expenses. Once files were scanned, the plan was to use offsite storage, thus recovering office space."

■ Implementation, Installation & Training

Singh notes that the implementation went well and without any problems. "We did a staged rollout to get over the learning curve and resolve any glitches first," he says. "Once the support team was comfortable with the product, we knew the implementation would go better."

The product itself is actually very intuitive and the learning curve was minimal, he adds, because of the Maya team's experience in IT and its employees who embraced the new technology. Thus, rolling out the software only required brief demonstration with the existing employees, and they had minimal delays because of training. "We did not reinvent the wheel with CNG-SAFE. It complemented our needs without any disruption, and we were able to design our paperless workflow exactly how we processed our paper workflow," says Singh.

"When we first started using CNG-SAFE," Singh says, "we were a small company and only in business for about a year. In an effort to save costs, our initial configuration was to use existing server hardware (which was a single server supporting the entire company). When we made the decision to go live, we purchased a dedicated server to host CNG-SAFE. In anticipation of future growth, we invested in a dual-processor server and a standard RAID array with sufficient disk space."

During the pilot testing, Maya's team was using the software to get more familiar with it. They were setting up the cabinets and users, and testing the security rights within CNG. "We were getting familiar with the scanners, supporting hardware, and settings," Singh adds.

But not knowing all the product's features, the company had planned to start the document archiving and then look into additional "paperless" software for its daily operations. "After we became more familiar with the basics of CNG-SAFE, we discovered its additional features, which would allow us to process an entire paperless workflow in addition to document archiving," Singh says.

Singh also notes that during the pilot period, as users were adjusting to the scanners, resolution, and DPI settings, Singh secured a baseline for Maya's storage requirements. And, depending on future storage requirements, NAS devices can be implemented if necessary.

"Also, the migration from the single server to a dedicated server was done easily with help from CNG tech support," says Singh. "With no downtime, the software was easily reinstalled on the new server, including the database. The local client-side software did not have to be reinstalled. We only had to change the IP number of the desktops to point to the new server, and we were up and running."

■ Big Plus, Big Savings

According to Singh, after installing and using the CNG-SAFE product, Maya saved about \$100,000 a year in conserved and recovered office space; \$135,000 a year in decreased support staff, senior examiners, and underwriters; and about \$90,000 in paper, shelves, and supplies that were previously required to maintain thousands of paper files.

"The file archiving is reliable and meets the regulatory requirements," Singh says. "We can increase the case load per person without increasing stress, and the increased efficiency searching for files and documents is phenomenal. It was a small investment in our IT infrastructure that had far greater ROI than anticipated."

As for the future, "We are committed to a paperless environment, and future plans will include CNG-SAFE in our business expansion plans, marketing, and IT operations," Singh says. "We are leveraging our paperless environment with our business partners, investors, and recruiting of new employees. It has definitely set us apart with the industry as a leader in integrating technology."

James True, vice president of business development at Cabinet NG, says the company has been part of many industry firsts. "We were the first to bundle workflow and access rights in the core product," he says, "and the first to offer integrated document management for QuickBooks. We have a patent-pending technology for integration with Windows Apps, a diversified customer base across most industries, and multiple configurations including CNG-SAFE for client/server; CNG-Online for hosted/SaaS; and CNG-Web for browser access."

Future plans include expanding the capabilities that support new online and mobile trends, says Abe Niedzwiecki, vice president of technology at Cabinet NG. "In addition, we plan to increase the number of integrations with SMB applications and grow the value-added reseller (VAR), independent software vendor (ISV), and original equipment manufacturer (OEM) channels to market." ■

by Julie Sartain

Cabinet NG CNG-SAFE

Transforms manual paper-based processes into efficient electronic workflows.

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