

Palm Beach County, FL brings its vision to reality with TAB FusionRMS.

Florida's Palm Beach County is known for its 38 unique cities and 47 miles of coastline, but it's more than just a nice place to visit. It's home to 1.25 million residents who are served by a county government that's always looking for ways to improve efficiency. Recently, the county sought ways to streamline the workflow among its employees and reduce storage costs for paper records.

They started by scanning paper documents to store them electronically. The county then looked for additional ways to parlay that million-dollar effort into a full-blown records management system that would track the electronic records they had just created to speed up workflow. The county envisioned a computer-based cross-referencing and indexing system to reach its version of document management nirvana—the ability to locate documents in seconds.

Richard Farquhar, Palm Beach County Engineering Department Director of Administrative Services, says he and his colleagues were very interested when they heard about TAB FusionRMS through their document storage and management dealer.

"After testing it ourselves, we immediately began demonstrating the FusionRMS system to all of Palm Beach County's departments. Our enthusiasm spread like wildfire—it looked like we had found the key to realizing our goals."

Once they understood the FusionRMS system's ability to track paper and electronic records in the same environment, Palm Beach County decided to go a further step by automating its paper record tracking as well within the FusionRMS Enterprise Records Management System. The final step was to utilize TAB's On-Demand Color-Coded Labeling solution to handle color labeling of original paper files the county is required by law to retain.

"TAB's color-coded strip labels make it easy to locate each folder, improving file room efficiency," says Palm Beach County Engineering Department Systems Administrator Nicholas Gazzillo. "With On-Demand Color-Coded Labeling and FusionRMS, we now have a history of each file—who had it, for how long, and if and when it was returned—and better control of files for regulatory compliance. The system even lets us know when a file can be destroyed."



Why TAB FusionRMS?

Before choosing TAB FusionRMS, Palm Beach County compared in-house development and maintenance costs against the functionality and costs of FusionRMS. According to Gazzillo, "We soon learned that it was far less expensive to purchase existing software than develop and maintain it ourselves."

Palm Beach County also wanted to make sure that FusionRMS would be flexible enough to meet the needs of its unique workflow environment.

"We didn't want to bend our way of working to the match the software we would select," says Gazzillo. "FusionRMS' optional programming module allowed us to easily add features that adapted the system to meet our users' workflow needs. In fact, TAB FusionRMS required far less customization than the other systems we considered. It offered at least 70 percent of what we needed for our workflow environment right out of the box, which is terrific. And with the programming tool, we got exactly what we wanted."

The county tested the systems' user-friendliness extensively during the evaluation period as well. Once again, the TAB system proved to be the winner. According to Farquhar, "We immediately saw that TAB FusionRMS' easy-to-use interface would enable users to hit the ground running with very limited training. The system leverages common technologies in a very intelligent way."

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With TAB FusionRMS Enterprise, the county continues to automate manual workflows and processes that touch various divisions while providing even better security.

Gazzillo shares an example, “Numerous divisions are involved in road projects—contracting, inspecting, paying, etc.—and each division keeps its own set of files. The TAB FusionRMS system will expedite the workflow among divisions, so there aren’t any time delays associated with paper transfers, reviews and sign-offs. Plus, individual divisions won’t need their own set of paper files, which will save paper and storage costs. And the different security levels FusionRMS provides for viewing and changing documents ensures the privacy and integrity of our files. It’s all about better document tracking, control and management.”

Gazzillo praises the versatility that FusionRMS provides. “We have the ability to create standardized, automated workflows while offering each department the flexibility to have its own look and feel. Plus, we can continue to meet government records retention standards.”

Looking Ahead

Palm Beach County has plans to incorporate TAB’s proven, useful technologies with the integration of TAB FusionRMS’ web application module. The addition will allow Palm Beach County to increase the availability of real-time information by providing immediate answers to the public’s online requests.

Learn How to Improve Compliance and File Room Efficiency with TAB FusionRMS for your Organization

Want to see how TAB FusionRMS can make your records management program more efficient? We can help! [Visit our website](#) or call us for more information.

Palm Beach County Quick Stats

TAB Customer:

Palm Beach County, Florida

Challenge:

Find a records management system to help the county realize its vision for combining paper and electronic records in a single system that expedites workflow, enables all county departments to locate and share documents more efficiently and prevents lost files to ensure regulatory compliance.

Solution:

TAB FusionRMS Enterprise for Government with On-Demand Color-Coded Labeling integration.

Results:

- Electronic and paper records management systems ensure that all county documents are easily and quickly accessible.
- Electronic records management system eliminates duplicate paper files among county divisions, thereby reducing storage costs.
- Automated document workflows expedite transfers, reviews and approvals.
- On-Demand Color-Coded Labeling software makes document retrieval faster and easier and ensures compliance with retention regulations



Technology Solutions

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