

## GlobalSearch® Changed Paper Processes As The Zarrow Family Changed Lives

The Zarrow Family is committed to helping alleviate poverty, enrich health and wellness, and empower and inspire community members to improve their lives. To do their job effectively, while helping those in need, Zarrow Family employees require organized and efficient document processes. However, the administrative support staff quickly became overwhelmed with paper-based inefficiencies when managing paperwork between their three Zarrow Family foundations, personal investments and accounting responsibilities.

Zarrow Family's Auditors Office, Accounting, IT, and Administrative departments were finding it hard to easily locate files, sign off on approvals in a timely manner and keep payments accurate. They were interested in a document management solution that delivered digital annotation capabilities and audit trail logs for visibility into document actions made by employees. With checklist in hand, the Zarrow Family found GlobalSearch Enterprise Content Management from Square 9, and they knew they had found the solution to accomplish these business goals, and more.

With GlobalSearch, the accountants, family members and auditors could now store all paperwork in one location. This provides personnel - on site and remote - with easy access to the data they need, the moment they need it. Searching for documents is made easy as GlobalSearch offers keyword searching allowing Zarrow Family to immediately retrieve files based on vendor, client or company name. GlobalSearch's annotation capabilities also made it easy for the Zarrow Family to edit, redact, highlight, and approve any document that is brought into the system. By systemizing manual tasks, employees are now notified when a document needs their attention, making it easy to share and collaborate on reviews, approvals, and changes made within the document. Administrators are provided with full visibility into the date, the time, and the employee that made those edits.



**Quick  
and  
Efficient**

In addition, Tabular Data Control, an advanced indexing GlobalSearch feature, has enabled all Accounts Payable and Revenue coding - a crucial part of the Accounting process - to be completed quickly and without error. All Invoices and

### Snapshot

**Industry:**  
Philanthropy

**Departments Impacted:**  
Administration, Accounting, Accounts Payable, IT Management

**Featured Products:**  
GlobalCapture, GlobalSearch, Tabular Data Control

**Objectives:**  
Eliminate storage, automate paper-based processes and make documents easily accessible for approvals, signatures and payments.

deposits now go through the system and each piece of data is automatically indexed, eliminating the need for employees to go back and manually double check their work. *At the end of the year all paperwork is then exported to a flash drive for external auditors to use, and all bank and investment correspondence and statements are stored in GlobalSearch, eliminating all paper copies and staff to spend 50% less time handling, filing, storing, requesting, and reviewing paper documents. Even managers are spending 10% less time searching for and signing checks.*

To solve additional business needs, the Zarrow Family implemented GlobalCapture®, Square 9's Document Capture Automation software. *Not only has 50% of the paperwork in the office been eliminated, but GlobalCapture has reduced time spent scanning and sorting through documents by downloading documents directly into GlobalSearch.* Once an invoice, report, or deposit detail is captured into the system, it is then placed into GlobalSearch. With a simple drag and drop, the integrity of the data within the document is validated, and automatically routed to its desired destination, notifying employees of its arrival. *This not only eliminated lost and misplaced files, but it increased productivity by 50%, saving the Zarrow Family an additional \$2,500 annually in paper, copy, storage and print costs.* To learn more about Zarrow Family Foundations, please visit [www.zarrow.com](http://www.zarrow.com).

**50% of  
Paperwork  
Eliminated**



## Interview: Melanie Copeland

Office Manager, Zarrow Family Foundations

### Q. What business challenges led you to discover Square 9's solutions?

**Melanie Copeland:** Ultimately the decision was made to reduce paper-based processes, eliminate onsite storage, and to make our documents easily accessible. The office was becoming cluttered and the paper shuffling for approvals and signatures was taking up a lot of time, causing delays in payments for our vendors. We wanted to speed this up not only for the staff completing the paperwork, but so our vendors get paid on time as well. Q. How have processes changed since implementing GlobalSearch?

### Q. How have processes changed since implementing Square 9's solutions?

**Copeland:** For us, one of the biggest improvements was automating approvals and signatures. Passing documents back and forth between different managers for approval became time consuming. With Square 9's solutions, this has not only saved staff time, but external auditors can complete their work in half the time now that they have digital copies of the paperwork. Documents are no longer lost or misplaced because they are all in one central location and whoever needs them has access to them.

### Q. In what ways has Square 9's product suite improved business performance?

**Copeland:** Our Auditors Office, Accounting, IT, and Administrative departments, spend half the time they normally would handling, filing, and storing paperwork. We all have enough to do as it is, so GlobalSearch and GlobalCapture really came through for us. GlobalSearch provided us with a centralized area to store and access our files along with the editing capabilities we were hoping for, while GlobalCapture made getting them into the GlobalSearch system, simple and effortless. Also, now that we have document versioning and history logs, it's easy to see who approved, signed off on, or made changes to a document. There's no more



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— Zarrow Family Foundations

guesswork and it's easy to manage and track who is viewing and editing documents.

### Q. Would you recommend Square 9's solutions?

**Copeland:** I would absolutely recommend Square 9's solutions to any company struggling with paper storage, paper costs and accessibility to documents. Not only have we seen ROI in terms of cost savings, but we were able to cut the time spent during the search and retrieval process of documents in half for more than one of our departments. If someone is looking to go paperless in one or many departments, Square 9's solutions provide the capabilities and functionality to help any company improve their business processes.