



University of Montana Foundation Reclaims Office Space With DocuWare and the StapleWare® Web Client Integration

Challenges

In fiscal year 2017, private support for the University of Montana totaled \$84.5 million. Of that, \$70.6 million came from gifts through the UM Foundation. An additional \$13.8 million came through private grants to UM. Our vision is to be a leader among like-sized university development operations and foundations from across the country in our production practices, our integrity of operations and our customer service, while creating a brand as a “best place to work.”

Every day, The Foundation office Staff communicates with donors to the University of Montana. Communications include email, letters and contracts. These documents must be kept confidential and the information must be entered into the accounting system. Until recently, all of the paperwork was filed into file cabinets. With hundreds of communications each month, this was a tremendous undertaking and was prone to mistakes. When staff needed information the staff searched through their extensive archives for the correct documents and then faxed them to customers. Too much time was spent filing the correspondence. The UM Foundation needed a more efficient and reliable way to archive and retrieve documents.

Solutions

DocuWare was installed with the AutoIndex module and StapleWare® Web Client Integration. All of the correspondence is stored in a DocuWare file Cabinet. The StapleWare® Web Client Integration is used to link Banner to DocuWare by the Banner ID #.

Results

- **Improved Customer Service** – The organization can focus on fundraising rather than spending time photocopying, filing and physically managing paper documents. Giving everyone more time with donors.
- **Document Access** - The Gift Processing team can quickly track handwritten notes, forms and scanned images of contributions that are stored electronically in DocuWare.
- **Records Management** - Data for these documents are uploaded in batches to the Banner ERP system, booking the gifts and simplifying records management.

“DocuWare has eliminated the tedious work of filing the documents related to gifts and it has made it easier and faster to find the information we need.”

Art Held - Director

Products

- **DocuWare ECM**
- **DocuWare AutoIndex**
- **StapleWare® Web Client Integration**

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