



Counterpart International takes to the cloud with Office365 and Aquaforest Searchlight

“Document content is now findable at the click of a button throughout all of Counterpart’s global locations.”

– Pablo A. Destefanis, Sr. Director | Information Technology

CASE STUDY OVERVIEW

ORGANIZATION/COMPANY

Counterpart International
www.counterpart.org

INDUSTRY

Non-Profit

ORGANIZATION SIZE

500 Employees in 28 countries

PRODUCTS & TECHNOLOGIES

Office 365
SharePoint Online
SharePoint 2010
Aquaforest Searchlight

COUNTERPART INTERNATIONAL

Counterpart International is a U.S.-based non-profit organization working in 28 countries with local groups to design and implement programs to address challenges around health; peace and security; climate resiliency; food security; and democracy, rights, and governance.

CHALLENGES FACED

Counterpart keeps meticulous records of its operations overseas. It employs both U.S. government (USG) and private funds and must comply with stringent reporting and auditability requirements, including recording evidence trails of how funds are used.

Before 2014, financial records were on paper. Finding specific data on paper records was a significant pain point for the organization. Documents were collected from several sources and archived by the field offices in places like Papua New Guinea, Zambia, and El Salvador.

Up to 30 boxes of paper a month were shipped from the field offices to the U.S. headquarters (HQ) for archiving. By the time a program closed, the headquarters staff could have received up to 100 boxes of paper. Upon arrival at HQ, documents had to be classified, boxed, and then sent for secure storage in an offsite archive. Retrieving and finding the required data could involve many people, taking days to complete. During specific audits, up to 100 boxes at a time had to be brought out of storage and searched manually.

As a non-profit organization, improving processes and reducing costs was and continues to be a critical, ongoing task. Improving this process ensured more attention and funds would be devoted to serving the beneficiaries of Counterpart’s programs. In 2014, Counterpart had the foresight to address this challenge of finding data while reducing costs, including shipping, storage, and staff time.



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MOVING TO THE CLOUD

Counterpart wanted to achieve a digital transformation of their field office operations that would eliminate storage of paper documents; provide electronic routing and approvals; offer multiple language recognition and a simple licensing structure; and provide storage and retention stability. A solution that would ultimately have a positive impact for staff and beneficiaries. To reach this goal, the IT department sought a cost effective solution that would address Counterpart's immediate needs and that would also fit in with its technology roadmap.

“We were looking for a solution to provide OCR for SharePoint, that could grow with our technology roadmap, that would not become too expensive over time, and with a good degree of customization. In Searchlight, we found the technology to work with SharePoint 2010 (which we had at the beginning of this project) and that works with Office 365 and SharePoint Online (which we have now), and that also provides further customization via an SDK. Looking at other products from Aquaforest such as Searchlight Tagger proves the ecosystem is growing, and that reinforces our choice.”

Pablo A. Destefanis, Sr. Director | Information Technology | Counterpart International

THE SOLUTION WITH SEARCHLIGHT

The Senior Director of Information Technology, Pablo A. Destefanis, arranged for a proof of concept (POC) using a free trial license of Aquaforest Searchlight. The POC included several practice runs over a period of two months. The Aquaforest Support team provided guidance on a few settings when requested.

RESULTS

Implementation took very little time. The permanent license key was applied to the POC to bring it into production. Field offices were provided with document scanners; some field offices worked directly with the SharePoint interface for uploads, but the majority used an application developed internally to allow for batch uploads (with metadata) over unstable links. All field offices use SharePoint to access the documents.

Once the IT Department had the model for one office, it was replicated for other offices, and monitored and adjusted to achieve their goals. Currently, new features in Aquaforest Searchlight are reviewed as they are released, and the decision is made whether these should be added to the production environment.

“As soon as the users started uploading documents, we were able to stop shipping boxes full of paper from across the Atlantic. The OCR features of Aquaforest Searchlight shone when we had our first audit, and we were able to cut to minutes tasks that used to take hours, if not days.”

Pablo A. Destefanis, Sr. Director | Information Technology | Counterpart International

Counterpart's experience is that the combination of Aquaforest Searchlight and SharePoint Online works extremely well. Aquaforest Searchlight is very solid and stable, requiring very little maintenance. It is a “hands off” operation that has so far processed over 1.5 million pages using Aquaforest Searchlight. Counterpart now not only has its tagged content online, but users can search for contents of any document. This is particularly important, as sometimes specific names or monetary amounts are not captured as part of standard metadata.

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Counterpart is an excellent example of a forward-thinking non-profit organization using cost effective, cutting edge technology to improve records management processes and further reduce operating costs. The use of Aquaforest Searchlight has boosted staff morale, lightening the load and providing a successful working model for an innovative organization. Monetary and staff time savings are devoted to serving the beneficiaries of the programs. Counterpart investors can be assured of clear accountability of fund usage and details of program delivery and implementation can be accessed at the click of a button. Counterpart's smart use of technology ensures beneficiaries remain the focus of the organization and supports their ethos of working in an ethical, compliant, and transparent way.

Neil Pitman, CEO | Aquaforest Ltd

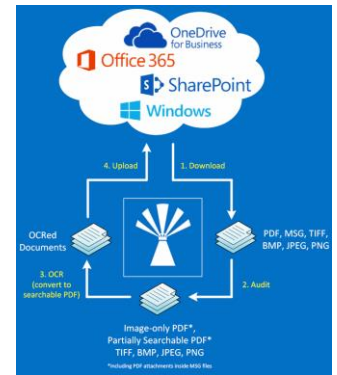
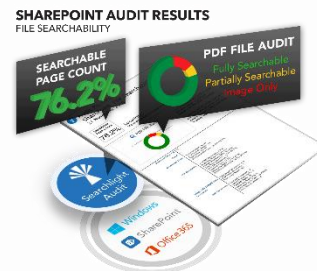


Aquaforest Searchlight is a unique solution that ensures that SharePoint Online content in Office 365 is fully text searchable with automated OCR.

OFFICE 365 SOLUTION BUILDER PROFILE: Aquaforest Limited

Aquaforest specializes in findability solutions for Microsoft platforms with focus on SharePoint Online in Office 365. Our vision is an ideal scenario where all content is easily discoverable, because it's text-searchable, tagged, indexed, and organized via metadata and smart analytics.

What Aquaforest Searchlight Offers :



Studies have shown that in many organizations 20% of documents are not fully text searchable. To solve this problem, Aquaforest Searchlight audits SharePoint Online in Office365 and automatically OCRs Image PDFs and other image files where needed so the content can be fully indexed by Office365.

There are other benefits : The automated Data Loss Prevention Facilities within Office 365 need text to be able to identify personal information such as credit card numbers, social security Numbers or other PII. Users will be able to reuse content from the searchable PDFs as they can select and copy the generated text layer.

The trial version of Aquaforest Searchlight allows unlimited auditing which will allow you to determine how many of your PDF files are not fully text searchable.

The software is capable of auditing very high volumes of files, and has support for up to 64 CPU cores.

Aquaforest Searchlight can be installed on any server will internet access which can be on premises or in the cloud.

Visit Azure Marketplace and search for "Aquaforest Searchlight" for details of our rapid solution implementation options.

WHAT OUR CUSTOMERS ARE SAYING

"The Searchlight product is unique and definitely a "leader". The product is easy to configure and does exactly what it states it does: Automatically OCR SharePoint document libraries or Local Locations. Highly efficient, fully auditable, complete with check out & check in comments.– Jeroen Schoenmakers, SharePoint Specialist - Ivanplats SA (Pty) Ltd

LEARN MORE

Visit www.aquaforest.com and download a trial copy of Aquaforest Searchlight today.