



infonic

CASE STUDY - Document Manager™ - Hillcrest Housing Association Ltd



KONICA MINOLTA

Eliminating paper records and improving workflow.



Company: Hillcrest Housing Association Limited

Country: United Kingdom

Industry: Social Housing and Care Services.

Profile: One of Scotland's largest providers of social housing.

Key Drivers: Reduction of volume of paper stored in advance of a move to a new HQ. Improved flow of documentation around the association's various offices.

Hillcrest Housing Association provides social housing to those in need including people with learning difficulties, drug and alcohol problems and other physical and mental difficulties. The organisation employs 600 staff and generates a great deal of paperwork at multiple sites across Scotland.

With a move scheduled to a new HQ building which would offer reduced records storage facilities, the association needed to reduce its paper records immediately.

Also the organisation had an urgent need for a system that would improve the ability of employees to retrieve documentation held throughout its various offices. There were a volumes of paper records stored at several remote sites and it was a very time-consuming process for staff to attempt to retrieve specific documents from these locations.

Invoice processes also needed to be streamlined. With approximately 100 budget holders in various locations all over Scotland it was inefficient sending invoices to all the relevant persons for authorisation. Typical paper invoice approvals, using the Royal Mail, took over a week.

Finally the Association had a expressed goal of achieving more environmentally sustainable business practices including reducing its paper usage.

Choosing Infonic Document Manager™

"We investigated 6 potential document management suppliers and issued a tender document. Following various demonstrations and discussions we decided the Infonic system best met our requirements" said Ken Birse, IT Manager.

Major factors leading the Association to choosing the Infonic EDM system were the ease with which documents could be automatically indexed using bar codes and the ease of integrating Infonic with other business applications and also the recommendation from their Platinum Partner Konica Minolta.

"The fact that it was a UK-based organisation who were willing and able to modify the package in line with our requests, the friendliness and professionalism of the Infonic staff and the fact that the solution was based on MS SQL Server and offered close integration with our existing QL system from Aareon all helped us choose Infonic Document Manager from among the competition" said Ken Birse, IT Manager.

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“The management tools are extremely easy to use, allowing easy creation of users, groups, drawers etc”

said Ken Birse, IT Manager

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Benefits of Document Manager™

- Reduction of paper usage and storage
- Instant recall of all relevant client information
- Accelerated invoice authorisation
- Improved staff efficiency
- Indexing of documents via barcode
- Admin tools allow easy set-up and deployment
- Simple integration with existing business systems

Document Manager™ in action at Hillcrest Housing

The most immediate cost savings delivered by Infonic for Hillcrest Housing have been a dramatic reduction in document printing, copying and storage.

The time-saving benefits delivered by the EDM software are largely related to acceleration of various document authorisation processes that formerly relied on external paper mail services.

Infonic's Document Management software has also enhanced staff productivity by providing instant access to relevant information on screen, without having to retrieve the information from other premises. For example, when viewing a tenant's record on screen it is now possible to easily call up all the correspondence from and to the tenant, including letters, tenancy agreements, original application forms, etc.

Infonic has enabled a more efficient process for authorisation of invoices too. All budget-holders have been trained to use the software and “already, we are able to see that less paper documentation is being passed around the offices and invoices can be authorised in a much quicker time” said Ken Birse, IT Manager.

IT staff at Hillcrest have found the management and admin tools within Infonic extremely easy to use, allowing easy creation of users, groups, drawers etc. The Infonic system is currently live for Hillcrest's HR, Payroll, IT and Purchase Ledger departments. The Association intends to roll Infonic out to the other departments in time for the move to new HQ premises.

“In the setup stages especially installing the system on our CITRIX server there were some issues with certain features not working correctly. However the Infonic helpdesk quickly resolved all setup issues and the system is working very well” said Ken Birse, IT Manager.