



➔ CASE STUDY: Metro Moneywise

➔ Document Management is a real asset to Metro Moneywise

Metro Moneywise, based in Rochdale, is a credit union and a not-for-profit organisation – all surpluses after operating costs are returned to members as dividends. The company is a major provider of personal finance to employees of Rochdale Council, Rochdale Healthcare NHS Trust and Hopwood Hall College.

Not enough space for document storage

Document storage was becoming a problem. Metro Moneywise sought a high-powered document management and archiving solution which would electronically capture and store every document generated and received by the company – paper based documents (such as reports, application files etc), emails and web content – and provide easy user access to all stored documents.

Brian Holden, Treasurer at Metro Moneywise had experience of OnBase Document Management Solutions in his previous role as debt recovery manager with a local council and was impressed with the solution. OnBase enabled council staff to retrieve records in less than 2 seconds.

Success with OnBase led to the council becoming a reference site for other authorities and businesses wanting to achieve the same.

OnBase handles every document

OnBase is an all-in-one software application combining the technologies of document imaging, COLD/ERM, document management and workflow.

- One database, one configuration utility and one customisable user interface for all processing and retrieval.
- Has highly evolved client/server architecture.
- Provides users with the ability to retrieve, revise, annotate, distribute, or post documents to the web.
- Web access via thin or thick clients.
- Integrates seamlessly with ERP, CRM and existing line of business applications.
- No more paper documents to store as everything is electronic.

Brian said: "In the first 2 years after OnBase was implemented at the council, over 20,000 files (the equivalent of 250,000 pieces of card and paper) were scanned into OnBase on a part time

basis. Some of these records were in very poor condition – faded or torn – but they all went into the electronic system. At the same time, the scanning of current files was also initiated.

The reliability of the system was excellent. In fact, we were never off line during my time with the council.

The Board at Metro Moneywise accepted my recommendation and we contacted ProcessFlows, who supplied and integrated OnBase."

Easy to install and use

Brian concludes, "We have had no problems with the integration – the installer quickly and effectively solved any initial issues. OnBase is easy to use. After an hour's training, new users are conversant with the system. OnBase is a first class product. ProcessFlows and Hyland, the developers of OnBase, both care about their customers and the service is excellent."