



➔ CASE STUDY: St Peter's Trust Company Limited

## ➔ St Peter's put their trust in ProcessFlows

St Peter's Trust Company Limited, based in Guernsey, is a well established (1976) independent provider of international financial services.

### Electronic and compliant 'filing'

The Guernsey Financial Services Commission regulates Trust Companies. Demonstrating compliance to these exacting and high standards is therefore a priority for St Peter's Trust.

Bryan Marsh, Computer Manager at St Peter's Trust, wanted to source a fully compliant method of electronically filing all their documents – such as Trust Deeds, Share Certificates etc, plus faxes and email – which would also move them towards a 'less paper' office and provide easy document retrieval from the desktop.

Bryan contacted Guernsey based Reseller and ProcessFlows Channel Partner, Fusion Systems. Fusion Systems offer a wide range of IT Services and solutions, including specialist software for the offshore finance industry. Fusion Systems recommended an OnBase document imaging and management solution.

OnBase integrates easily with other business applications to maximise workflow and reduce paper dependency; providing great scope for automation and productivity in the paper intensive environments that are common in the offshore finance industry.

OnBase's promise to improve efficiency means that a return on

**“ProcessFlows was able to advise on the questions presented relating to the ability to analyse data in specific areas and create forced and nested input fields and consistent Keyword field input screens. Security issues on all document types was also on the ‘wish list’ as was scan lockouts (due to volume input) and also a method of task usage to “paper-clip” documents together (our plastic wallets in the old way of thinking). The product is now running as efficiently as is possible with the modules currently used.”**

Bryan Marsh, Computer Manager

investment can often be achieved in less than one year, which makes a compelling business case for adopting the technology.

### OnBase was integrated with the incumbent line of business system

In collaboration with Fusion, ProcessFlows supplied and installed document management solution, OnBase, integrating it with Flying Boat, Fusion's specialist application used widely for Trust and Company

administration and other applications within the financial services industry.

As expected, implementing changes in business processes, influencing the way staff work and overcoming resistance to that change was challenging – but with the help of the Partners, integration was straightforward and staff were trained.

### Improved daily operations

OnBase has improved our daily operations and continuity has proved a catalyst for 'educating' our staff into thinking more about document type, therefore speeding up the retrieval process further. Our business produces mounds of paper and has resulted in large stores of historic documents. Little time is now spent in the filing room searching for key papers and OnBase has surpassed our expectations for timely retrieval.

### A paperless office

Although the company is now 'live' with OnBase, manual document filing is still happening in a small way, but following a full audit we plan to become a 'paperless office' (except for legally required “permanent” documentation such as agreements, certificates, statutory documents, etc.) and attempt to become true converts to electronic workflow.

➔ For more information, please email [sales@processflows.co.uk](mailto:sales@processflows.co.uk) or contact **ProcessFlows**, Gateway House, Tollgate, Chandlers Ford, Southampton, SO53 3TG  
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