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M-Files Document Management



Shian Housing Association Ltd

Storing and managing large quantities of paper documents is expensive. This is especially true for Housing Associations, where an auditable trail of all activity related to their properties needs to be archived, indexed for later reference and disposed of securely. All of which requires dedicated resources, whether it's time or money.

Established in 1988, Shian caters for the general housing requirements of black and minority ethnic (BME) individuals in Hackney, Haringey and Islington with their portfolio of 450 homes. In recent years, Shian has recognised the difficulties of identifying and retrieving documents from a paper based archive system.

To tackle this growing paper trail and to improve existing business processes, Shian have deployed M-Files, an intuitive electronic document management (EDM) solution that has been integrated with their housing management system, Pyramid.

Leslie Laniyan, Managing Director of Shian Housing Association, said *"At Shian, we maintain a detailed record for anything related to our properties and tenants. This includes maintenance work, invoices, arrears letters, new projects and other miscellaneous documents. Therefore it is vital to ensure that all this data is handled with great care, from recording, archiving and destruction.*

However, even with a well-established strategy in place, there are unavoidable overheads including physical storage space, staff time, printing supplies and shredding services. Time is a particular issue when we're manually combing the archive for documents stamped for disposal, sometimes requiring a few days to complete the whole process.

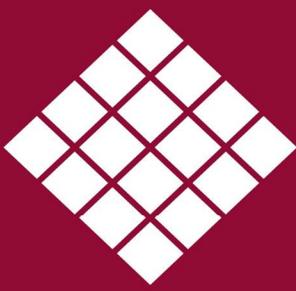
These problems will only grow more costly as the company takes on new projects. Therefore, we recognised the need for securing a solid EDM foundation whilst our paper archive is still at a manageable capacity.

Implementing M-Files with OmniLedger provided us with the unique opportunity of being able to integrate a document management solution within our Pyramid Housing Management system. This kind of integration allows us to use our internal tenant and property database in Pyramid as a source of metadata (indexing information) for all our documentation, making the saving process seamless and provides our staff with a fixed universal indexing procedure to work from.



The solution has been very well received by our staff. In thanks, due to M-Files intuitively embedding itself within the Windows operating system and Microsoft Office applications. As a result, from day one our staff were presented with a familiar arrangement and have been productively phasing out elements of our paper system.

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OmniLedger have also configured our existing scanner to save the files directly to the M-Files vault. This has been an invaluable tool, allowing us to efficiently scan important documents posted to our office and then associated them to a tenant or property.

By storing our documents in a controlled electronic environment, staff have been able to retrieve files quickly using the search facilities provided within the M-Files vault. Furthermore, the integration with Pyramid enables us to quickly access all files related to a tenant or property with a simple click of a button.

These kinds of features are already empowering staff with more time to attend other areas of their work. With each maintenance invoice, there could be up to 20 pages of supporting documents including satisfaction letters, internal progress reports and photos. Processing over 100 such invoices a month, we expect to see a saving in printing and disposal overheads as more of these are integrated into M-Files.

M-Files is proving to be a powerful tool for Shian and we plan to develop our internal processes to be centred around it, making full use of the allocation and approval features. OmniLedger have been instrumental developers with the integration process and we look forward to maximising our use with new document disposal workflows and automated metadata population for Pyramid generated documents.”

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