



Company: Hillcrest Housing Association Ltd

Country: United Kingdom

Industry: Social Housing and Care Services

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

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

Eliminating paper records and improving workflow at Hillcrest

Hillcrest Housing Association is one of Scotland's largest registered social landlords with over 5000 rented homes and an operational area covering Dundee, Angus, Perthshire, Fife and Edinburgh. Hillcrest is now the parent of a range of subsidiaries, some of which are substantial companies within their own right, all with growth prospects. The organisation employs over 700 staff and generates a great deal of paperwork at their multiple sites.

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

Also, the organisation had an urgent need to improve the way employees retrieved documentation held throughout its various offices. There were large volumes of paper records stored at several remote sites which had resulted in a very time-consuming and difficult process for staff to retrieve specific documents.

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

Finally, the association had expressed a personal goal to achieve a more environmentally sustainable business practice, including reducing its paper usage.

Choosing Document Manager

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

Major factors leading the association to choose Document Manager were the ease with which documents could be automatically indexed using barcodes and the ease of integrating with other business applications.

"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 Document Logistix 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 Document Manager from among the competition" said Ken Birse, IT Manager.

CASE STUDY: Document Manager™ – Hillcrest Housing Association Ltd



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

Ken Birse
IT Manager

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 barcodes
- Admin tools allow easy setup and deployment
- Simple integration with existing business systems

Document Manager in action at Hillcrest Housing

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

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

Document Manager 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, and so on.

Document Manager has enabled a more efficient process for authorisation of invoices too. All budget holders have been trained to use the software and “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 administration tools within Document Manager extremely easy to use, allowing easy creation of users, groups, drawers and so on. Document Manager initially went live for Hillcrest's HR, Payroll, IT and Purchase Ledger departments and was subsequently rolled 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 Document Logistix helpdesk quickly resolved all setup issues and the system is working very well” said Ken Birse, IT Manager.