

Reducing reliance on paper documents



Company: Midlands
Co-operative Society

Country: United Kingdom

Industry: Food and non-food
retail, travel, funeral services and
transport.

Profile: Largest independent
regional co-operative society in
the UK.

Key Drivers: Provide
consolidated central document
management solution to the
diverse group of businesses.
Reduce reliance on paper
documents. Reduce spend on
third-party scanning and indexing
services.

The Midlands Co-operative Society was operating two legacy content management systems that were no longer supported by their manufacturers. The Society wanted to move all of its businesses onto one standard Enterprise Content Management system.

The Society's main objective was to reduce reliance on paper documents. There were clear benefits in moving to a modern Document Management (DM) solution, especially as the Society had recently invested heavily in linking all of the remote locations with one Wide Area Network.

The Society was spending £70k per annum on third-party scanning and indexing and was looking for a way to reduce these costs. The intention was to use the Multi-Function Devices (MFDs) already purchased across the society to perform this scanning in-house. The Society wanted to achieve as much automatic content indexing as possible.

Choosing Document Manager

The Society carried out a full procurement process, assessing a number of systems via full software demonstrations and reference visits. Once Document Manager was identified as the preferred solution, the society's IT team carried out a Proof of Concept project covering many aspects of the business requirements including auto-indexed invoice scanning, screen scraping, workflow business system interfaces and legacy system data migration.

Across a range of document types, the Document Manager solution offered significant advantages such as the ability to index via barcodes. Also, Document Manager's ability to retrieve documents from business applications, such as the accounts payable and general ledger systems, would speed up document retrieval.

"The Society were impressed by Document Manager's flexibility to cope with different business requirements and the range of document types within each business" said Simon Frodsham, Project Manager.

CASE STUDY: Document Manager™ – Midlands Co-operative Society



“Document Manager had the Flexibility to cope with the different business requirements within the society and with the individual document types within each business”

Simon Frodsham
Project Manager

Benefits of Document Manager

- Reduction in paper usage
- Improved staff efficiency and reduction in workload
- Flexibility to handle wide range of document types
- Indexing of documents via barcode
- Reduction in spend on third-party scanning services
- Documents are now scanned at source

Document Manager in action at Midlands Co-op

Since going live in April 2009 over three million documents have been migrated to Document Manager from legacy solutions.

The document management solution has assisted Midlands Co-op in achieving the objectives of reducing paper usage within the society, making the organisation more environmentally friendly, becoming increasingly efficient, providing an effective Disaster Recovery strategy and securing customer and operational data.

Within the Society, there are many different businesses; the initial programme delivery included the ‘big wins’ for improved document management within HR, Finance, Property, Retail and the Capital Approval workflows.

“The Document Manager solution is extremely versatile, delivering a vast range of DM solutions with impressive features including its intuitive and easy-to-use application, its ability to interface with all our systems to date and the speed of the document retrieval” said Simon Frodsham, Project Manager.

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