

EDM

Leaders in Electronic
Document Management

EDM Group CASE STUDY:

Wakefield & District Housing Association



May 2009



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EDM delivers document management services and solutions to Wakefield and District Housing resulting in significant benefits to employees, suppliers and residents

The EDM Group has successfully delivered a series of document management services and solutions to Wakefield and District Housing (WDH). The contract, worth £275K, has seen EDM implement an online, hosted document management solution which provides WDH with simple and seamless access to housing files and other vital documents, as well as enabling the improved processing of purchase invoices. Over the course of the project implementation, EDM has processed 4.5 million images and now hosts over 6 million images on its managed database.

EDM has made a significant difference to the way in which WDH operates and has improved its internal efficiency, its relationships with suppliers and the overall customer satisfaction of the residents which live in its properties.

As a direct result of this project the time spent accessing property and tenant information has been reduced by 75% equating to a £150k per annum saving. Additionally the 215 square metres of floor space that was taken up by the 240 filing cabinets is now being utilised as desk space and staff rest areas, the heavy paper files no longer need to be carried from one office to another, creating a better environment and reducing any health and safety concerns.

Building for Success

WDH is a Registered Social Landlord (RSL), formed in March 2005, and is a not for profit organisation with charitable status. The organisation owns and manages over 31,000 properties which are divided into five management areas and provides homes for families, elderly, single and vulnerable people. During 2007 WDH decided to improve the way it handled house files by converting them into digital format and hosting the files on a secure, scalable, easily accessible internet based platform. EDM was chosen to undertake this project to provide both a high volume document scanning service and a comprehensive Document Management system – *EDM online* – for the storage and retrieval of these important and regularly accessed documents.



Paul Wood
Service Director – ICT

Paul Wood, Service Director - ICT comments, "In 2006 WDH moved to brand new Headquarters, bringing together 300 employees - from across numerous Wakefield offices. We decided at this point that it would not be practical to continue storing large amounts of paper documents at the new site and we should move to an online process. Further investigation into our processes also indicated that a significant amount of front line employees' time was taken up with tracking down paper files. The digitisation of these files would give more time back to front line staff, which could be better spent with customers."

Implementing the Solution

From the file conversion perspective, the challenge was to ensure that the project was managed in such a way as to ensure that the location and status of all files was known at all times throughout the physical movement and subsequent conversion processes.

From a systems perspective, there were minor software configuration changes required in order to facilitate the receipt and processing of data associated with the files, this included the generation of file specific bar-coded cover sheets, required to facilitate the accurate capture of index data, crucial to the future search and retrieval requirements of the system users.

EDM's vast experience in the management of large volume file conversion projects ensured that appropriate controls were put into place to manage all aspects of the file movements and conversion. These tracking systems use barcode technology to associate files with shipping boxes, and processing jobs, and tie in with Bureau Manager systems to ensure that the location of every file is always known, and that unexpected issues can be managed to a successful outcome by the Customer Services Team.

EDM has quality management systems in place certified to ISO 9001:2000. As with all such projects, the quality of the resultant images and Management Information was vitally important; to meet this requirement quality reference points were set early in the project and images randomly sampled throughout to ensure acceptability.

In order to minimise errors in the capture of index data, EDM worked closely with WDH to utilise existing data contained with the Housing Management System for the generation of file-specific bar-coded cover sheets. These unique references were then read by our post-scanning processing system and associated with the file images; the data was then merged with the Housing System extract within *EDM online* resulting in 100% accuracy of index data. This accuracy is continuously maintained by regular automated data updates exchanged between the systems of WDH and EDM Group.

Benefits of the EDM Solution

Wood, continues "EDM has delivered numerous benefits to our operation. The cost of maintaining files has decreased. Valuable office space has been freed up due to the removal of all manual filing systems and operational efficiency has been dramatically increased through improved access to files."

"WDH is now in a position to make all relevant documentation available to field-based employees as well as those in the main office centres. We have over 350 employees who primarily worked with paper files who can now easily access the digital images within seconds of logging onto the *EDM online* website. This can be done from the office, at home or on the move. The searching is simple and intuitive and the accuracy of index data and quality of electronic images also exceeded expectations."



The main project objective of converting all files from paper to electronic image was met within both budget and anticipated timeframes. Wood concludes: "WDH selected EDM because of its demonstrable quality of service, proven experience, ability to meet the required timescales and price. The reaction from our employees within WDH has been excellent, from everyday systems users through to the Project Management Team up to Directors. All of the anticipated benefits (and more) have been achieved within both timescales and budget."

EDM Group has now become a trusted partner of WDH and has also implemented automated invoice processing systems and is currently working through the conversion of other document types.

In completing this project EDM Group Limited employed the following technologies:

- Internal file tracking, image manipulation, project and quality management systems. As part of its standard Document Conversion service EDM utilises these systems and processes to constantly monitor file locations, produce the highest possible quality output in terms of images and associated data and to provide the Client with up to date, accurate Management Information in relation to project progress and budgetary control.
- From the Service Users' perspective *EDM online* is the tool by which they now access all files in electronic format. *EDM online* is a secure, scalable, web-hosted Document Management system that can be utilised by any organisation to support the controlled, audited access to files of any type. Where required *EDM online* is regularly configured as a tool to support the management of documents through Business Processes, so delivering significant efficiency improvements.