

# OnBase - an asset to Metro Moneywise

## The Customer:

Metro Moneywise, based at Rochdale is a credit union and a not for profit organisation. All surplus after operating costs are returned to members as dividends and not as directors' salaries. It is a major provider of personal finance to employees of Rochdale Council, Rochdale Healthcare NHS Trust and Hopwood Hall College. Metro Moneywise was formed in 1990 with 22 members and £100 in assets. It has now 2,500 members and assets of £2.5m and is constantly expanding.

## The Challenges:

In 2002, the company moved to new premises at Globe House in Rochdale. Accommodation was much improved over their previous premises, but nonetheless it was clearly apparent that document storage would be a problem. Brian Holden, the Treasurer at Metro Moneywise had previous experience of OnBase, the high-powered document management and archiving solution from ProcessFlows, at his employment with the local council, where he was the debt recovery manager before his retirement last year.

Brian commented, "Over a period of 2 years at the council, we scanned in 20,000 files or over 250,000 pieces of card and paper, on a part time basis. Some of these records were very poor, on faded card or torn paper, but they all went into the electronic system. During this time we were also scanning the current output of new files. When people saw the end result they were astounded at the quality of the OnBase product. We had visitors from other authorities and private firms. Above all else two items really sold the system.

Firstly the response time for retrieval of a record, under 2 seconds and secondly the quality of the print out of the same. The reliability of the system was excellent; in fact we had never been off line during the past 2 years. Not far from us was an authority that had spent over £1m on a system and they had scrapped it because of the poor performance." He continued, "Metro Moneywise has 2500 members and 3 staff and document imaging represented a major investment at the time, but I recommended OnBase to the Board and it was accepted unanimously, the investment has been very worthwhile."

## The Solution:

OnBase electronically captures, stores and manages literally every document generated or received by a company - including paper, reports, application files, e-mails, and web content. It handles everything you need to do with those documents - retrieve, revise, annotate, distribute, or post to a website - and integrates seamlessly with ERP, CRM, and other e-business applications to create a single point of online access to all relevant information. The software combines the technologies of document imaging, COLD/ERM, document management, and workflow into a single, enterprise-class application.

This is an all-in-one software application - One database, one configuration utility and one customisable user interface for all processing and retrieval. OnBase has highly evolved client/server architecture with web-enabled access through thin or thick clients, Windows Explorer or other enterprise applications and is completely point-and-click configurable.

The set-up at Metro Moneywise consists of 4 standalone PC's running Windows XP and the OnBase/file server runs on Windows 2000. The system is networked in one office and has a total of eight users.

Although still only in their first year of operating OnBase at Metro Moneywise, over 4000 old files have been input. In addition, new files are being input as



**Brian Holden**, Treasurer for Metro Moneywise

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they come off the system at the rate of about 70 per week.

## The Benefits:

Brian comments further "We have had no problems with integration, the installer quickly and effectively solved any initial installation issues and we have been happy with the account management from ProcessFlows. The product is easy to use and it takes only about an hour's training for a new operative to become conversant with the system."

Even though staff at Metro Moneywise have been in their new premises at Globe House for less than a year, they are already reaping the benefits of the space saving and easy retrieval of documents that OnBase provides. "OnBase is a first class product and both the UK Master VAR ProcessFlows, and Hyland care about their customers. I have even talked to Hyland in Ohio, the development company, and the service was excellent." Brian concludes.