

OnBase from ProcessFlows drives FTAs integrated document management

The Customer:

The Freight Transport Association (FTA), is one of the largest trade associations in the UK, representing the transport interests of over 11,000 companies that move goods by road, rail, sea and air. Members of the FTA operate over 200,000 goods vehicles, which is nearly half the UK fleet. In addition, they consign over 90 per cent of the freight moved by rail and over 70 per cent of sea and air freight.

The Challenges:

One of the key factors in the FTA's ongoing success and penetration throughout the UK, is the depth and breadth of its expertise in freight transport, and the access members have to its information and advisory services on technical, legal and operational questions. Information needs to be accessed quickly and effectively to ensure FTA members meet compliance requirements today and have advance warnings and support for planning for compliance in the future.

So much information and documentation presented Nigel Smart, Head of IT at the FTA, with a significant challenge; to ensure information was readily available and that the FTA maintained a high level of service to their members. He comments *"We originally looked towards imaging solutions as a replacement for microfiche archiving. We needed to scan, index and store documents as digital images. We were introduced to OnBase via our supplier Xclusive Solutions, a ProcessFlows Partner. On reviewing the solution, it soon became evident that there were far greater gains to be made from workflow, document management and archiving. We dealt with the account teams from Xclusive and ProcessFlows, the distributor. Their approach proved to always be responsive."*

The Solution:

OnBase can lower the total cost of ownership while offering a solution that will provide the most dependable, mission-critical technology for information and service needs. It provides integrated document management, which manages virtually every kind of document image, host generated reports, application files, HTML forms, emails and video clips. It also covers every stage of the document lifecycle creation/input, storage, retrieval, revision and distribution.

The OnBase solution they installed is built upon a highly evolved web-enabled, client/server architecture that leverages the openness and scalability of databases like Oracle and Microsoft SQL Server, to deliver high performance solutions for the department, division or enterprise.

The Benefits:

Nigel continues, *"OnBase has made a significant difference to the Credit Control department. Very early gains were realised in this department who are using OnBase to archive copy invoices from our accounts system for use in payment chasing. The main benefit has come from the ability for credit staff to archive, view and forward copy invoices, saving time, paper and reducing human error. We are now also using OnBase to act as a central library for storing and distributing our policy documents internally and to FTA members. We have at least 5000 stored. We don't believe we have realised the full benefit of this yet and there is still much untapped potential in the system we have."*

OnBase offers users the flexibility of accessing the system through several types of thin (browser-based) clients, a traditional thick client, Windows Explorer or even other enterprise applications. The FTA has five key users with full client access. However, the web tool enables the remaining staff and potentially members, to access the FTA OnBase library. This provides fast, consistent and secure access to all documents stored in the OnBase system. Retrieving a document is nearly



Nigel Smart, Head of IT

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instantaneous through several search methods, including the Document Retrieval Dialog Box, Foldering, Custom Query, Text Search and OnBase's award-winning Cross-Referencing. The Client is the central location where to import, organise, secure, retrieve, enhance and distribute all of the data.

On the installation process Nigel comments, *"The installation raised a few issues but fortunately ProcessFlows were dedicated to the task and with the exception of a few small minor items it was installed according to time scales."*

OnBase can meet unique requirements by allowing customers to select from among over 30 separately licensed OnBase modules that provide specialised input, management and output functionality. This allows clients to invest in the solution they need today and then incrementally, expand and enhance the system as their needs grow.

Nigel concludes, *"The concepts of Document Management are not always clear and its interpretation can often vary, depending on who you talk to. You need to speak with a reputable supplier and think about the business benefits. These have to be carefully weighed up and the right tool selected for the job. In our case, the modular approach of OnBase enabled us to benefit from document management and, in addition, spread the cost of the solution."*



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